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“PROGRAMME EDUCATION” EXECUTIVE AGENCY

**EVALUATION PLAN
OF
PROGRAMME “EDUCATION” 2021-2027**

Sofia, April 2023



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Abbreviations:

Grant – Union support granted by the Funds

EAPE – “Programme Education” Executive Agency

EC – European Commission

EU – European Union

EFSM – European Funds under shared management

ESF+ – European Social Fund Plus

ERDF – European Regional Development Fund

PPA – Public Procurement Act

UMIS – Information system for the management and monitoring of the funds of the EFSM

MC – Monitoring Committee

MES – Ministry of Education and Science

NSI – National Statistical Institute

PE – Programme Education 2021-2027

PA – Partnership Agreement

MA – Managing Authority

CCU – Central Coordination Unit



1. INTRODUCTION

Programme Education 2021-2027 (PE) is funded by the European Social Fund Plus (ESF+) and the national budget. The Programme is the main instrument to support reforms in the education system and will play a crucial role in addressing the consequences of COVID-19.

PE will focus its efforts on supporting:

- Better coverage of children in pre-school education and primary school education, improving the quality of pre-school and school education and reducing the share of ESL;
- Providing inclusive education in primary education, through general and additional support for personal development, with a focus on children and school students from vulnerable groups, incl. Roma;
- Improving the quality of education through modernisation of learning content, application of competence model and digital transformation in education;
- Interest activities related to the development of personal qualities and expressions of the abilities of children in pre-school and school education with a special focus on the transition to green economy;
- Improving the attractiveness, accessibility, quality and relevance of VET to labour market needs and its link to specific territorial characteristics;
- Modernisation and linking to the labour market need of higher education, introducing a competence approach, digital transformation conducting doctoral studies related to the needs of specific economic sectors;
- Creating a skilled workforce fit for the digital and green economy, qualification of teachers in higher education institutions;
- The qualification and capacity of pedagogical professionals, non-pedagogical staff and educational mediators will be supported horizontally, including in the field of green and digital transitions.
- The Programme will support access for vulnerable groups, disadvantaged groups and non-pedagogical staff to higher education.

In the 2021-2027 programming period there is continuity with the concepts of implementation, evaluation and monitoring for the 2014-2020 period. Some evaluation requirements have been simplified and some requirements are more flexible, such as:

- There is no obligation to carry out an ex-ante assessment;
- The timing and consistency of evaluations depend on the specificities of the Programme, with the exception of an impact assessment to be carried out in June 2029;
- The selection of the evaluation criteria in the individual evaluations also depends on the programme, but Article 44(1) of Regulation (EU) 2021/1060 of the European Parliament and of the Council of 24 June 2021 recommends that at least one evaluation should cover the five criteria set out in the Better Regulation Guidelines¹, i.e., effectiveness, efficiency, relevance, coherence and EU added value.

¹ See Commission Staff Working Document SWD 2021 (305) Better Regulation Guidelines; page 26



The Evaluation plan of the Programme Education 2021-2027 shall include information on planned evaluations, including the timing and type of evaluation, the methodological approach, data needs and availability, as well as the necessary resources. The roles and responsibilities of Programme authorities and stakeholders and the follow-up of evaluation results are also outlined.

1.1. Regulatory framework for drawing up the Evaluation plan

The ESF+ is the main European instrument to support employment and social inclusion. In the 2014-2020 programming period, the ESF allocated significant resources to education and social inclusion policies implemented through Operational programmes in the 27 Member States. As provided for in the Common Provisions Regulation (EU) No 1303/2013, “in order to improve the quality of the preparation and implementation of programmes and to assess their effectiveness, efficiency and impact, evaluations shall be carried out”.

During the 2021-2027 programming period, implementation and results will continue to be analysed. This will require strengthening the current monitoring and evaluation systems and capacities, including data collection mechanisms. Evaluation plans will continue to be mandatory and the impact assessment will be given additional weight. As there are different methods for determining the impact of operations supported by the ESF+, managing authorities have to decide which method or combination of methods is best suited to meet regulatory requirements. Precise quantification of the impacts of interventions also includes counterfactual impact assessments. The focus on high performance and result orientation is an important feature of the new provisions. High-quality evaluation strategies and techniques are essential for acquiring important knowledge that shows to all MS which interventions lead to results and which do not. It is essential to improve the quality of evaluations and develop reliable evidence of added value.

In accordance with the principles of Article 44(5) and (6) of Regulation (EU) 2021/1060 of the European Parliament and of the Council of 24 June 2021, the Member State or the managing authority shall draw up an Evaluation plan for conducting evaluations and submit it to the Monitoring committee (MC) no later than one year after the decision approving the Programme. The Evaluation plan is a tool for planning the evaluations of PE at programme level, which describes and plans the types of evaluations that will be carried out during the implementation period of the Programme from the date of its approval by the EC to 2030 and relates only to PE. The Evaluation plan is prepared by the Managing Authority (MA) of PE.

The need and procedures for carrying out evaluations of Programmes and their general rules are described in the following documents:

- Regulation (EU) 2021/1060 of 24 June 2021 laying down common provisions on the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, the Just Transition Fund and the European Maritime, Fisheries and Aquaculture Fund and the financial rules for those and for the Asylum, Migration and Integration Fund, the Internal Security Fund and the Instrument for Financial Support for Border Management and Visa Policy;
- Regulation (EU) 2021/1057 of 24 June 2021 establishing the European Social Fund Plus (ESF+) and repealing Regulation (EU) No 1296/2013;
- Commission Delegated Regulation (EU) No 240/2014 of 7 January 2014 on the European Code of Conduct on Partnership in the framework of the European Structural and Investment Funds;



- EC Guidance Document on Evaluation Plans, Terms of Reference for Impact Evaluations, Guidance on Quality Management of External Evaluations (February 2015);
- COMMISSION STAFF WORKING DOCUMENT Performance, monitoring and evaluation of the European Regional Development Fund, the Cohesion Fund and the Just Transition Fund in 2021-2027 SWD(2021) 198 final
- How to use administrative data for European Social Funds counterfactual impact evaluations — A step-by-step guide for managing authorities, European Commission, 2020;
- Advanced counterfactual evaluation methods. Guidance document, European Commission, 2019;
- Design and Commissioning of counterfactual impact evaluations — Practical guide, European Commission, 2021;
- Guidance on Evaluation Plans, Terms of Reference for Impact Assessments, Quality Management Guide for External Evaluations (February 2015);
- EC Guide to Monitoring and Evaluation of European Cohesion Policy (August 2018);
- Assessment of the quality of evaluation plans: structured template (June 2015);
- Guidance on Impact Assessment: Quantitative Methods and Practices, World Bank, 2010.

1.2. Objectives and tasks of the evaluation plan

The main objective of the Evaluation Plan is to support the implementation of the Programme and to ensure the effective use of evaluation results as a tool for the management of PE throughout the Programme's implementation period. The actions set out in the Plan shall ensure:

- a regular evaluation process and provision of an evaluation framework during implementation, as well as appropriate planning that ensures good quality of evaluations;
- timely and appropriate evaluations regarding the phase of implementation of the Programme and the reporting requirements to the Commission;
- distribution of human and financial resources according to the planned evaluation activities;
- follow-up of the findings/results of the evaluation to the general public and stakeholders.

Pursuant to Article 44 of Regulation (EU) 2021/1060 of 24 June 2021, in order to improve the quality of Programme design and implementation, the Member State or the managing authority shall evaluate the Programmes on the basis of one or more of the following criteria: effectiveness, efficiency, relevance, coherence and Union added value. In this regard, the specific objectives of the evaluation plan focus on several important aspects:

- determining the level of achievement of the strategic objectives of the Programme;
- improving the quality of implementation of the Programme;



- aggregating and analysing information on the effectiveness, efficiency and impact of the Programme;
- identify the contribution of PE to the achievement of visible and sustainable results and objectives set out in the European and national strategy papers;
- the impact of the Programme in terms of relevance, coherence, sustainability and the added value for the European Union resulting from the implementation of the Programme;
- enhancing the Programme's management capacity;
- strengthening the system for its implementation;
- meeting the needs of beneficiaries;
- supporting the decision-making process in the MA;
- successful implementation of European funds under shared management (EFSM).

All evaluations foreseen in the Evaluation Plan will be financed with funds from Priority Axis 4 “Technical Assistance” of PE.

2. GOVERNANCE AND COORDINATION STRUCTURES FOR THE EVALUATION PLAN AND ACTIVITIES

2.1. Managing Authority

The Managing Authority of the PE, “Programme Education” Executive Agency, is responsible for the organisation, coordination and implementation of the evaluations of the PE. The MA may outsource some of its tasks related to this process. The PE Evaluation plan provides a comprehensive framework for the ongoing evaluation throughout the programming period. The functions of drafting and updating the Plan are carried out by the Programming, Monitoring and Evaluation Directorate (PME).

The tasks of the MA of PE shall include:

- preparation of an Evaluation plan for PE;
- providing for coordination to the EC and;
- submission of the Evaluation Plan to the MC of PE for discussion and approval;
- coordination, implementation, monitoring and modification of the tasks set out in the Plan;
- an update of the Evaluation plan may be carried out on a proposal from the EC, the Monitoring Committee or at the discretion of MA;
- development of technical specifications as well as and documentation for outsourcing evaluations to external contractors or organizations;
- drawing up a timetable for carrying out ongoing evaluations;
- providing information to the MC of PE on ongoing evaluations;
- definition of requirements for carrying out evaluations and monitoring;
- providing the necessary data for the evaluations to be carried out;



- verification of the extent to which evaluation recommendations have been implemented;
- cooperation with other institutions in planning (identifying areas of study), preparing and carrying out research within the framework of PE;
- exchange of good practices with other programmes and other EU Member States;

The coordination of the Evaluation plan and the evaluations carried out under the PE will be carried out in close cooperation with all directorates within the MA, as required by the Programme Management Manual.

2.2. European Commission

Representatives of the European Commission (EC) are involved in the evaluation process through their participation in the meetings of the Monitoring Committee. The EC coordinates the Evaluation plan and has an obligation to carry out an interim and retrospective evaluation. In addition, the Commission, at its own discretion and initiative, may also, in partnership with the Member States concerned, carry out evaluations related to the implementation and impact of the PE, for example if the latter show a significant deviation from the original objectives.

2.3. Monitoring Committee of PE

The Monitoring Committee shall periodically review progress in achieving the objectives of the Programme on the basis of the documents submitted by the Managing Authority. In accordance with the Internal Rules of procedure of the Monitoring Committee of PE, its composition shall:

- discuss and approve the Evaluation plan, as well as its subsequent amendments, if any, in accordance with Article 40(2) of Regulation (EU) 2021/1060;
- should be informed of the implementation of the Evaluation plan, the results of the PE's evaluations and the actions taken in response to the recommendations and findings of the evaluation reports in accordance with Article 40(1) of Regulation (EU) 2021/1060

2.4. Other key stakeholders

Other key stakeholders from the evaluation process and its results are the Ministry of Education and Science (MES) and the Central Coordination Unit (CCU), other Managing Authorities – with a view of coordination and exchange on planned evaluations, methodologies and findings (e.g., CLLD and ITI measures). Providing the Ministry of Education with relevant information from the evaluations carried out under the Education Programme 2021-2027 and on the implementation of operations of strategic importance within the meaning of Article 2(5) of Regulation (EU) 2021/1060 will support the process of better management decisions. In relation to the functions performed by the CCU for the management of the European Funds under shared management (EFSM) in Bulgaria, the information from the evaluations carried out under the Programme supports the CCU in the process of monitoring and evaluating the efficiency of the inputs and the implementation of the objectives and indicators set in European and national strategic documents.

The evaluations included in the Evaluation plan will be carried out by external evaluators in the form of external services and/or by MA experts pursuant to Articles 40 and 54-57 of Regulation (EU) 2021/1060.



Beneficiaries in the framework of approved projects under PE will be involved in the evaluation process, providing information on the implementation of specific activities and/or evaluation/self-assessment during the implementation of the projects.

Table 1: Functions and responsibilities in the evaluation process

The Responsible Institution	Activity	The period	The reason
Managing Authority	Preparation of an Evaluation plan and update it if necessary. Submission the plan to the MC for approval by written procedure	By 8 August 2023 Update — if necessary.	Article 44(6) of Regulation (EU) 2021/1060
	Carrying out evaluations according to the Evaluation plan	Throughout the programming period and during the implementation period of the Programme.	Article 44 of Regulation (EU) 2021/1060
	Organisation and coordination of the preparation of technical specifications for external evaluations	Throughout the programming period and during the implementation period of the Programme	Article 44 of Regulation (EU) 2021/1060
	Making all evaluations publicly available	Throughout the programming period and the implementation period of PE	Article 40 (7) of Regulation (EU) 2021/1060
	Sending the evaluations to the EC	Throughout the programming period and the implementation period of PE	
	Preparation and submission to the Commission a report summarising the results of all evaluations	Until 15.02.2031	Article 43 of Regulation (EU) 2021/1060
	Providing the resources necessary for the preparation of the evaluations	Throughout the programming period and the implementation period of the PE, as well as after its completion (for ex post evaluation)	



The Responsible Institution	Activity	The period	The reason
Monitoring Committee of PE	Discussion and approval of the Evaluation plan and its amendments and follow-up of the implementation of the evaluation findings and recommendations.	Throughout the programming period and the implementation period of PE	Article 44(6) of Regulation (EU) 2021/1060
	Is informed of the results of the evaluations		
European Commission	Take notes of the results of the evaluation carried out.	Until 15.02.2031	Article 43 of Regulation (EU) 2021/1060
	Carry out an interim and ex-post evaluation of the programme in cooperation with the MA	31.12.2024 for mid-term evaluation and 31.12.2031 for final (retrospective) evaluation	Article 34 of Regulation (EU) 2021/1057 of 24 June 2021 establishing the European Social Fund Plus (ESF+)
External evaluators	Carry out evaluations according to the Evaluation plan and technical specifications	Throughout the programming period and the implementation period of PE, as well as after its completion (for ex post evaluation)	Article 44 (3) of Regulation (EU) 2021/1060
Central Coordination Unit	Is informed of the results of the evaluations and on the follow-up of the implementation of the evaluation findings and recommendations.	Throughout the programming period and the implementation period of PE, as well as after its completion (for ex post evaluation)	
Permanent interdepartmental WG for the evaluation of ESIF	Ensurance of central coordination of Programme evaluation and assistance to the MA in developing Evaluation plans and their subsequent implementation	Throughout the programming period and the implementation period of PE, as well as after its completion (for ex post evaluation)	
National Statistical Institute	Assistance to the MA in collecting and aggregating the data needed to carry out assessments.	Throughout the programming period and the implementation period of PE	Rules for the provision of statistical products and services



The Responsible Institution	Activity	The period	The reason

3. EVALUATION SYSTEM OF PROGRAMME EDUCATION 2021-2027

3.1. Definition of evaluation

Evaluations are a quantitative and qualitative analysis that determines the relevance of the Programme, the degree of implementation of the objectives and the effectiveness of the priorities, the efficiency of the spending, the impact and sustainability of the results of the PE, as well as the coherence of the Programme with other EU objectives and policies and the EU added value resulting from the implementation of the Programme. The evaluation shall provide reliable and useful information on the topics under assessment, looking for changes related to the outcome, effectiveness, efficiency and impact directly related to the Programme.

3.2. Types of Evaluation

3.2.1. Ex-ante evaluation of financial instruments

Pursuant to Regulation (EU) 2021/1060 of 24 June 2021, the decision of the managing authorities to finance support measures through financial instruments should be taken on the basis of an ex-ante assessment. According to Article 58 of the same Regulation, the appropriate support from the Funds through financial instruments is to be provided on the basis of an ex-ante evaluation to be prepared under the responsibility of the managing authority.

The ex-ante assessment may be reviewed or updated, may cover part or all of the territory of the Member State and may be based on existing or updated ex-ante assessments.

In the period 2020-2021, a Preliminary Assessment and Concept for an investment strategy for the implementation of Financial Instruments under the Program "Education" 2021-2027 was prepared under specific position No. 5 in the field of "Education, according to contract No. 25/06.03.2020 and Additional Agreement No. 1 dated 12.11.2020.

3.2.1.1. Evaluation regarding the use of REACT-EU funds pursuant to Article 92b(12) of Regulation (EU) No 1303/2013

The COVID-19 pandemic has put the education system in Bulgaria in force majeure circumstances where, for a very short period of time, it was necessary for all participants in the process to move to an atypical way of learning. In order to prevent the widening of disparities across the EU Member States and to avoid an uneven recovery process, the EC provided additional resources for the Structural Funds for the period 2020-2022, by amending Regulation (EU) No 1303/2013, designated as REACT-EU. In this regard, the Managing Authority (MA) of Operational Programme "Science and Education for Smart Growth" 2014-2020 (OPSESG) carried out an amendment to the OPSESG 2014-2020, implementing the procedure "Equal access to school education in crisis conditions". The aim is to improve the conditions and ensure equal access for distance learning in electronic environment and to create the conditions for improving the digital skills of teachers to work more effectively in a virtual environment and to promote the use of innovative teaching and learning methods, as well as to encourage parents' motivation to engage more actively in the educational process at a distance in an electronic environment in order to support students in the family environment.



In this respect, as required by the above-mentioned Regulation, Member States shall ensure that at least one evaluation of the use of REACT-EU funds is *carried out by 31 December 2024* to assess their effectiveness, efficiency and impact.

3.2.2.2. Impact Assessment of the Programme

According to Art. 44 of Regulation (EU) 2021/1060 of 24 June 2021 the Member State or the managing authority evaluates the programmes. During the period of implementation of the Programme, the MA of the PE will carry out ongoing evaluations in accordance with the need to improve the quality of the program and/or its individual priorities, specific goals or procedures, as well as to ensure the effectiveness, impact, sustainability and compliance of the assistance provided by the ESF+ and the implementation of the Programme.

Ongoing evaluations will be conducted in accordance with the activities provided for in this plan. The results of the PE evaluations will be presented to the Monitoring Committee and published on the EAPE website. In conducting the ongoing evaluations, special attention will be paid to the need for a reliable link between the evaluation and the MA decision-making process. The results of the evaluations will allow informed decisions to be made to continue successful procedures during the current or the next programming period.

Pursuant to Article 44(2) of Regulation (EU) 2021/1060, the MA has an obligation to organise an evaluation of the effects of the Programme “Education” by *30 June 2029*.

An impact assessment of the measures implemented during the implementation of PE will be carried out with a view to fine-tuning the criteria for the selection of operations, building on already implemented operations and maximising the effect and improvements of key indicators in the planning and approval of future operations — in the field of:

- § inclusive education;
- § digitalisation and application of the competence model in education;
- § vocational education and training;
- § higher education;
- § socio-economic integration of marginalised communities such as Roma and a bottom-up approach;
- § support in relation to targeted actions to combat child poverty;
- § quality and compliance of education with the labour market.

3.2.2.3. Ad-hoc evaluations

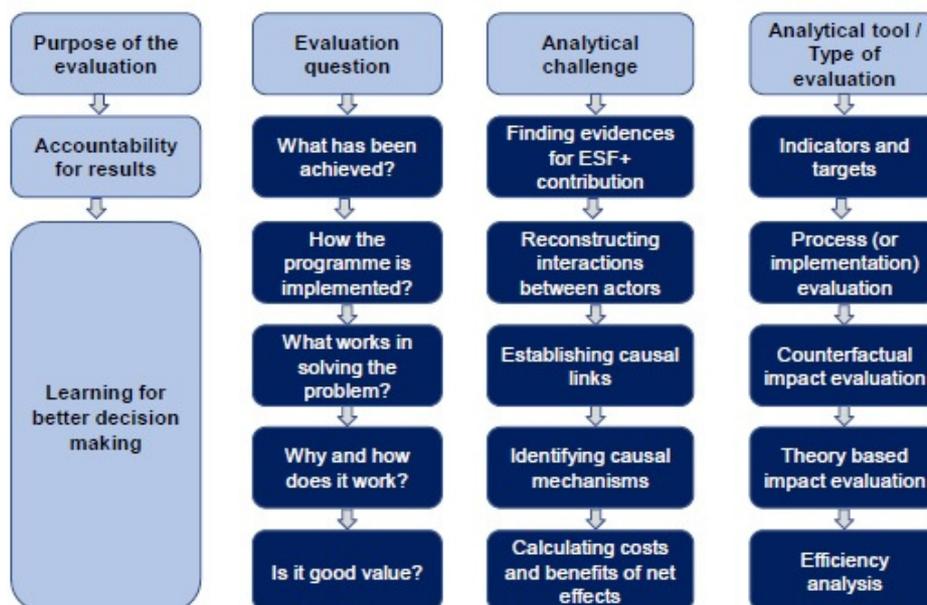
In accordance with the procedures set out in the Management Manual of PE, ad-hoc assessments will be carried out if necessary:

Where the monitoring of the programme reveals a significant deviation from the objectives initially set. In case a risk of non-compliance of indicators is identified (in annual reports or in reports following ongoing evaluations), the MA should initiate an ongoing assessment. This evaluation will analyse all data (implementation of the programme by assessing the level of achievement of objectives, implementation of indicators, financial indicators, etc.). The evaluation results report should identify deviations from the objectives set, as well as other problems and their causes, and provide recommendations to address them. **Where changes to the Programme are proposed**, an evaluation must be preceded, except when it comes to correcting technical errors.



All evaluations will be used to answer specific questions related to programming, implementation and results. They will be carried out by independent experts and/or experts of the MA, depending on their complexity and purpose. The design of evaluations, methods and costs varies greatly, depending on the grant in each Priority, and the questions to which the evaluation will have to answer. Generally speaking, assessments can solve three types of issues - descriptive, normative, and causal.

3.3 Methods and approaches for carrying out evaluations



Evaluation methods and approaches shall seek the causal effects of interventions and evidence whether ESF+ funded interventions are actually responsible for the changes in the situation of participants and the subsequent achievements resulting from the interventions.

In order to measure the effects of interventions, it is necessary to use the following main evaluation methods:

- Process evaluation – This type of evaluations is tasked with analysing the effectiveness of work/processes/systems and proposing appropriate measures with a view to speeding up and improving them.
- Theory Based Assessment – This type of assessments should basically apply traditional research methods – both qualitative and quantitative. Among the most commonly used in the first group are recruitment and review of specialised literature and documents, conducting interviews and focus groups, case studies and others. Among the latter, the use of methods of descriptive statistics, logical models, method for calculating unit costs (in estimating efficiency), sampling statistical surveys or different variations of methods that quantify benefits and costs.
- Impact assessments – In this type of evaluations, the aim is to clarify how much of the result obtained after the end of an intervention is due to this intervention. If



necessary, an impact assessment may also be carried out with control groups (counterfactual assessments).

- Triangulation Method – Data and conclusions must be justified by using at least three sources of information in order to obtain a potentially adequate level of assurance. The evaluator should use multiple sources of information during the evaluation and rely on data that is supported coherently by information sources. An evidence-based approach (i.e., quantitative, evidence-based) and opinion-based (i.e., subjective sources such as interviews, studies, focus groups) as well as expert judgement should be used. Documentary studies should also be included in the evaluations in order to obtain a high level of assurance.
- A cost-benefit analysis, which shall include: objectives and contribution to a specific objective, need for project implementation, financial and economic analysis and risk analysis. Also, environmental impact (if applicable), regulatory compliance, horizontal aspects and synergies between the projects under assessment.

In the course of the application of quantitative and especially qualitative methods, some specific additional social analysis techniques may also be used. In view of the above, the assessments set out in the Plan will combine quantitative and qualitative methods.

Two models are possible in the construction of evaluation methodologies:

1). Model of representative research on a national scale, where empirical information is collected with quantitative methods. (Standardised interview, survey, content analysis). Area of use; evaluation of the implementation, effectiveness and efficiency of procedures measures, evaluation of management and control systems;

2). Model of non-representative studies in which the units of study are selected with quota or typological samples, and the direct collection of the requested information is done with qualitative methods (focus group discussions, in-depth interviews, semi-structured interviews). Area of use: impact assessments.

Quantitative Methods	Quality methods
1. Information request (direct survey and structured interview)	1. In-depth interviews
2. Content Analysis and Document Analysis	2. Discussions in Focus Groups
3. Secondary Data Analysis	3. Projective and role-playing methods

3.4 Provision of statistical data

In providing statistical data, the MA will use UMIS, its own database and data from the EC, NSI and legitimate international sources. In this regard, the MA will seek cooperation with the NSI. The process of providing data by the NSI is described in the Law on Statistics and the Rules for the Provision of Statistical Products and Services. The MA will continue to maintain an early warning system in the current programming period, which will periodically collect data from UMIS and, if necessary, data from other sources for the implementation of the indicators under each procedure and will track the programmed, agreed and verified values of each indicator. When outsourcing the evaluations, the MA will, if necessary, request from the evaluators a set of methodologies on the use of the data collected by the MA, according to certain requirements:

- size of data



- creation of a sample
- sample coverage
- frequency.

Table 2: Sources of information

The source	The information
Directorates within MA	Specific information not available in UMIS, such as technical and financial verification data, other financial data, documents, reports, etc.
UMIS	Information at project level and procedure
Beneficiaries	<p>Specific information on output and result indicators as well as demographic indicators, educational characteristics of target groups, vulnerable groups, labour market status (where applicable), working time equivalent (where applicable), institutions and organisations carrying out activities under each procedure, etc.</p> <p>For operations of strategic importance within the meaning of Article 2(5) of Regulation (EU) 2021/1060 within the framework of their implementation, the specific beneficiary MES, through the organisation and management team, will monitor the results of the project activities, including annual monitoring of the educational performance of the students as a result of the support under the operations. In this regard, the Concrete beneficiary (CB) will set up a Monitoring Expert Group to support the monitoring and evaluation activities of the operation of strategic importance. For the purpose of monitoring the operation, the CB will present regularly, after the end of each school year, information on the implementation of the project activities, which will be used for the purposes of the monitoring of PE.</p>
NSI	Specific information from studies, data not available in the UMIS and, where necessary, in a specific agreement with the MA.
Information collected from field studies and other studies, interviews and surveys with stakeholders.	Collection of data not available in UMIS and MA
Eurostat, UN, OECD	Statistics on indicators concerning educational policies at national and international level.
National strategic, planning and programming documents published in the Official Gazette or in the	National Priority Targets



The source	The information
Governmental Public Consultation Portal, respectively www.strategy.bg, as well as the official websites of the relevant institutions;	
— Data and information of the European Commission;	Relevant to the actions financed
Data from the SIBILA econometric model.	Data for assessing the effects of ESIF on the economy of Bulgaria, maintained by the Ministry of Finance;

3.5 Capacity building for evaluation

For the successful implementation of the evaluations also during the 2021-2027 period, the MA has envisaged an increase in the administrative capacity of staff through training, exchange of experience on the use of appropriate tools and participation in various fora related to evaluations. Training activities for experts will be funded under Priority Axis 4 “Technical Assistance” of PE. The collaboration with OECD will result into increased notion of evaluation in the Managing Authority and the beneficiaries, encouraging and supporting local/national evaluation networks; setting up ‘dialogue’ arrangements such as consultations and dissemination events with potential evaluators; incentivizing collaboration between international and national/regional consultants, and consulting experts, universities and research centers in key priority areas so as to increase knowledge transfer.

4 MANAGEMENT OF THE ASSESSMENT OF THE PE

The evaluation process of PE consists of several main stages, the implementation of which ensures the quality and usefulness of the evaluations carried out. The stages of the evaluation management process are:

- ✓ planning and organisation of the evaluation process;
- ✓ conducting an award procedure for selection of external evaluator;
- ✓ conducting an evaluation;
- ✓ preparation of reports (the EC requires at least an inception report, a draft evaluation report and a final evaluation report);
- ✓ making the results of the evaluation available to stakeholders;
- ✓ analyse the results and, if necessary, take actions.

The evaluation procedure is described in detail in the PE Management Manual.

4.1. Planning and organisation of the evaluation process

The planning of the evaluation shall be made to analyse the needs and the initial scope of the evaluation, as well as to provide for the necessary resources in terms of data, time and financial means.

The planning of the evaluation shall consist of the following components:

- ✓ setting up the objectives and target group;



- ✓ identification of a control group (depending on the type of assessment);
- ✓ definition of the scope;
- ✓ formulating questions and tasks;
- ✓ approach and methodology;
- ✓ establishing a schedule plan;
- ✓ estimation of the necessary evaluators and their competencies;
- ✓ formulation of technical specifications.

4.2. Budget

According to intervention code 181 “Evaluations and studies”, the budget of the Evaluation Plan is BGN 9 000 000 incl. VAT from Priority Axis 4 “Technical Assistance” of PE.

4.3. Timetable for the implementation of the evaluation plan

The evaluation plan of PE includes an indicative timetable for carrying out impact evaluations. The evaluations planned in the timetable will be carried out by the Organisation for Economic Co-operation and Development (OECD) under an agreement to be concluded. Ad-hoc evaluations can be implemented by other external or internal evaluations.



Table 3: Timetable for implementing the Evaluation plan

Thematic evaluation/Procedures covered	Type of procedure	Timetable for reporting/ Indicative start of operations under PE					
		2023	2024	2025	2026	2027	2028
1. Evaluation of REACT-EU interventions		Kick off	Final report				
2. Inclusive education measures, including support for targeted actions to combat child poverty		Kick off	Interim report 1		Interim report 2		Final report
General and additional support for personal development in school education	Operation of strategic importance	January 2023					
General and additional support for personal development in pre-school education	Operation of strategic importance	October 2023					
Expanding the scope in pre-school and school education, by supporting the effective functioning of the mechanism for joint work of institutions to cover, include and prevent children and school students dropping out of education	Operation of strategic importance	December 2023					
Preventing harassment and violence and reducing school aggression	Competitive procedure		November 2024				
3. Educational integration of marginalized communities such as Roma and a bottom-up approach, including support for targeted actions to combat child poverty		Kick off		Interim report 1 (or early 2026)			Final report
Adult literacy	ITI approach		July 2024				



Thematic evaluation/Procedures covered	Type of procedure	Timetable for reporting/ Indicative start of operations under PE					
		2023	2024	2025	2026	2027	2028
Complex programs at municipal level for desegregation of schools, prevention of secondary segregation and anti-discrimination	ITI approach		December 2024				
Enabling access to education by overcoming demographic, social and cultural barriers	CLLD approach		June 2024				
Promoting intercultural education through culture, science and sport	Competitive procedure	November 2023					
4. Digitalization and implementation of the competence model in education		Kick off	Interim report 1(or early 2025)		Interim report 2(or early 2027)		Final report
Support for talented students	Competitive procedure			December 2025			
Improving the quality of general education through effective implementation of the competence model	Operation of strategic importance	August 2023					
Digital transformation of school education, incl. VET	Operation of strategic importance	April 2023					
Supporting the creation and implementation of an innovation culture, innovative kindergartens and schools	Competitive procedure			May 2025			



Thematic evaluation/Procedures covered	Type of procedure	Timetable for reporting/ Indicative start of operations under PE					
		2023	2024	2025	2026	2027	2028
5. Vocational education and training. Quality and relevance of education with the labour market		Kick off		Interim report 1	Interim report 2 (or early 2027)		Final report
Adapting VET to labour market dynamics <i>and</i> Skills development support for the professions of the present and future	Operations of strategic importance	May 2023					
Development of the dual training system in VET	Operation of strategic importance		June 2024				
Support to Centres of Excellence in VET	Competitive procedure			August 2025			
6. Higher education. Quality and relevance of education with the labour market		Kick off	Interim report 1		Interim report 2		Final report
Introduction of forms of dual training in applicable higher education <i>and</i> Career guidance of students through practices and development of entrepreneurial skills	Operation of strategic importance		April 2024				



Thematic evaluation/Procedures covered	Type of procedure	Timetable for reporting/ Indicative start of operations under PE					
		2023	2024	2025	2026	2027	2028
Modernisation of higher educational institutions (under OP Science and Education for Smart Growth 2014-2020). Projects will be completed by the end of 2023	Competitive procedure						
Establishing the competence approach in professional fields important for the economy of the region and the labour market, in partnership with business, expanding digital competences and digital educational content in the HE	Competitive procedure			May 2025			
Access of vulnerable groups, disadvantaged groups and non-pedagogical staff to the HE	Competitive procedure		May 2024				
Support for the development of academic staff in higher education institutions and scientific organisations, including raising interest and improving conditions for PhD programmes linked to labour market needs through the support of modular programmes	Competitive procedure		January 2024				



4.4. Dissemination of evaluation results

A final element of the evaluation process is the dissemination of the results of the research carried out and the implementation of the recommendations of the evaluation report. All evaluation reports will be published on the website of the EAPE and on the single information portal for general information on the management of the EU Structural Funds and Cohesion Fund in the Republic of Bulgaria for the general public in accordance with Article 43(4) of Regulation (EU) 2021/1060. This is an important condition for increasing transparency in the management and implementation of the Programme.

Each evaluation report will include a summary. The summaries of the evaluation reports and the annual, interim and final implementation reports will be translated into English — for the convenience of EC staff and auditing organisations, for academic purposes, as well as for information to the general public in the EU and globally.

The distribution channels are as follows:

- the evaluation plan, the final evaluation reports and the summaries of the annual implementation reports will be published on the following websites: <http://sf.mon.bg/> and <http://www.eufunds.bg/>;
- the above documents are also published on the portal with authorised access for participants in the MC of PE;
- the results are presented at seminars, workshops and conferences.

4.5. Use of evaluation findings in decision-making.

The findings of the evaluations will be used to improve the programming and implementation process of subsequent operations by the end of the programming period and, if necessary, to take corrective measures (e.g.: change the design of operations, continuing or not with a next phase, identifying and managing risks for the implementation of the programme, increasing the administrative capacity of the MA) as well as preparing a possible future programming period. Information on the corrective measures taken by the MA will be contained in the annual implementation reports of PE, which summarise the main conclusions.

The conclusions and recommendations of the evaluations can be used to update and/or develop new strategic documents in the fields of education, as well as to change the legal framework (if necessary)

The members of the Monitoring Committee will be regularly informed about the conclusions and recommendations of the evaluations, as well as the follow-up actions on the implementation of the accepted recommendations by the MA and the beneficiaries/relevant stakeholders.

According to the provisions of Regulation (EU) 2021/1060, special monitoring and communication measures are applied to operations of strategic importance. In this regard, for the operations of strategic importance during the implementation of the procedures, an expert monitoring group is to be created, including representatives of the departmental specialized directorates in the Ministry of Education and Science, who support and implement the relevant policies, thus ensuring the follow-up of the implementation of the findings of the evaluations.

4.6. Assessment Quality Management Strategy



In order to ensure a better quality of the assessments, the MA will carry out regular monitoring and evaluation of the implementation of the Plan, as well as its timely revision, by creating a Steering Working Group for evaluation within the Managing authority, as well as a subcommittee for external evaluation of the the Programme to the Monitoring Committee in order to provide external feedback and guidance for possible changes. The Steering Working Group will accept the OECD reports and this will ensure good quality of the assessments.



5. SCOPE AND KEY QUESTIONS TO BE ANSWERED BY EVALUATIONS

The intended thematic areas for evaluation aim to establish the extent to which the main objectives of the Programme have been achieved, which is a key tool for supporting education reforms aimed at improving the quality, inclusiveness, effectiveness and relevance of education and training systems with the needs of the labour market, promoting equal access to and completion of quality and inclusive education and training, in particular for disadvantaged groups, promoting lifelong learning and the socio-economic integration of marginalized communities, such as Roma . Also, the evaluation will show the contribution of the implemented procedures under the Programme for the implementation of the priorities laid down in the national strategic documents in the field of education, namely Priority 1 "Education and skills" of the National Development Program BULGARIA 2030, the Strategic Framework for the Development of Education, education and learning in the Republic of Bulgaria (2021-2030) and the Strategy for the Development of Higher Education in the Republic of Bulgaria for the period 2021-2030. Also, the "Education" Programme provides for the upgrading of a large number of projects implemented during the previous programming period and in this regard, it is planned to make an impact assessment, or to use the one made, when applicable, to interventions implemented under OPSESG, since for many of them it takes years before the effect is fully manifested.

5.1 Evaluation of OPSESG procedure regarding the use of REACT-EU funds pursuant to Article 92b(12) of Regulation (EU) No 1303/2013

Thematic areas for evaluation	Key evaluation questions	Main evaluation methods	Main sources of information
1. Assessment of EU added value. 2. Evaluation of effectiveness and efficiency, including spending. 3. An assessment of the impact of the procedure on the inclusion of pupils, especially those from vulnerable groups, in distance learning in an electronic environment. 4. Evaluation of the effective distribution of equipment and equipment purchased under the procedure.	<ul style="list-style-type: none"> To what extent have the objectives of the intervention area been achieved? If there have been any delays or challenges in the implementation of activities, what caused them? How have the actions under this intervention helped address challenges students faced during the COVID-19 crisis, especially those from vulnerable groups? How have the actions under this intervention helped address the needs of 	Theory-based evaluation (theory-based evaluation) An assessment of the short- and long-term effects of the implementation of REACT-EU measures. Comparative analysis of data on the implementation of the objectives of the new dedicated thematic objective in terms of the results of the	<ul style="list-style-type: none"> Documents of the MA; Manual for the management and implementation of the OPSESG; Application guidelines and their annexes; Procedure under OPSESG



<p>5. Assessment of the impact on the quality of the educational process. Impact of the measures on education reforms.</p> <p>6. Assessment of schools' readiness to conduct distance learning in electronic environments in the event of new pandemics and crises.</p> <p>7. Regional impact assessment.</p> <p>8. Assessment of the improvement of the skills of professionals for teaching in distance learning in e-learning following the support of the procedure.</p> <p>9. Assessment of the difficulties in implementing the activities and the contribution of the measures to the implementation of the objectives set out in the programme, the normative and strategic documents in the field of education and their action plans.</p> <p>10. Assessment of the sustainability of results (including the products created under the project(s))</p>	<p>education professionals during the COVID-19 crisis?</p> <ul style="list-style-type: none"> • To what extent has the intervention improved or hindered the quality of the educational experience in an e-learning environment? • To what extent are schools (in terms of technical support, internet access, teacher qualifications, students' digital competencies, etc.) ready to provide quality education in the event of new pandemics and crises that may disrupt in-person learning? 	<p>implemented measures at SWR and other regions.</p> <p>Analysis of effectiveness</p> <p>Process evaluation (process evaluation)</p> <p>Analysis based on theory</p> <p>Method of triangulation</p> <p>Analysis of the short- and long-term effects of the implementation of REACT-EU measures.</p> <p>Comparative analysis of performance data in terms of the results of the implemented measures at SWF level and other regions.</p> <p>A cost-benefit analysis;</p> <p>Conducting interviews/focus groups with MA/beneficiaries and field visits;</p> <p>Cabinet study — review of documents, case studies;</p> <p>Randomised Control Trial;</p> <p>Matching;</p> <p>Counterfactual evaluation.</p>	<p>„Education for tomorrow“;</p> <ul style="list-style-type: none"> • EAPA website (http://sf.mon.bg/); • UMIS, website of the single information portal on the Structural Funds (https://www.eufunds.bg/index.php/bg/); • Normative documents at EU level — Regulations, Guidelines and EU Guidelines, etc. European documents; • MA documents, strategic documents and analyses at national and European level; • PE 21-27. • Methodologies for calculating the indicators under the Programme; * • MA documents, including methodologies and analyses;
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* • Official statistics, information on programmes from other European countries.

5.2 An assessment of the effectiveness, efficiency, EU added value and impact of the measures implemented in the field of inclusive education;

Thematic areas for evaluation	Key evaluation questions	Main evaluation methods	Main sources of information
<p>1. Assessment of EU added value.</p> <p>2. Evaluation of the educational outcomes of the students involved in activities for general and additional support for personal development under the program before entering the procedure and after its completion, against the educational outcomes at national level.</p> <p>3. Assess the effectiveness, efficiency and impact of inclusive education measures supported by the Programme on school retention and reducing ESL rates.</p> <p>4. Assessment of the capacity of pedagogical and non-pedagogical specialists supported under the programme, including educational mediators to provide general and additional support for personal development.</p> <p>5. Assessment of the impact of the procedure on the implemented policy for</p>	<ul style="list-style-type: none"> • To what extent have the objectives of this intervention area been achieved? If there have been any delays or challenges in the implementation of activities, what caused them? • What effect has the intervention area had on the learning and educational experience of students, especially those from vulnerable groups, those whose mother-tongue is not Bulgarian, and those from socio-economically disadvantaged backgrounds? • How have the actions under this intervention contributed to increasing student retention in school (i.e., reducing absenteeism and early school leaving)? • How have the competencies of pedagogical specialists changed under this intervention? 	<p>An analysis of the effectiveness, efficiency and effectiveness of measures co-financed under the ESF+ in the field of inclusive education;</p> <p>Analysis of the data obtained by the Ministry of Education in connection with the annual monitoring of the educational performance of pupils as a result of the support under the RO 2021-2027;</p> <p>Theory of change;</p> <p>Results-oriented monitoring (Results-Oriented Monitoring);</p> <p>Comparative analysis of data on the implementation of the</p>	<ul style="list-style-type: none"> • Documents of the MA; • Handbook on the management and implementation of PE; • Application guidelines and their annexes; • Performed procedures under OPSESG „Active inclusion in the pre-school education system“, “Support for success“ • EAPA website (http://sf.mon.bg/); • UMIS, website of the single information portal on the Structural



<p>inclusive education at national level, such as compatibility with regulations, additionality and upgrade with national programmes, etc. European programmes. Assessment of the need for regulatory changes.</p> <p>6. Assessment of the change in parents' attitudes towards education as a result of the trainings under the procedure.</p> <p>7. Assessment of the degree of improvement of Bulgarian language proficiency by students for whom it is not a mother tongue.</p> <p>8. Assessment of the impact of the implemented educational programmes and practical activities for environmental and civic education on the representatives of the target groups.</p> <p>9. Regional impact assessment.</p> <p>10. Assessment of the difficulties in implementing the activities and the contribution of the measures to the implementation of the objectives set out in the programme, the normative and strategic documents in the field of education and their action plans.</p> <p>11. Assessment of the sustainability of results (including the products created under the project(s))</p>	<ul style="list-style-type: none"> • How do the actions under this intervention compliment other inclusive education policies at national level? 	<p>implemented measures at SWR and other regions.</p> <p>Process evaluation and process evaluation;</p> <p>Analysis based on theory;</p> <p>Method of triangulation.</p> <p>Cost-benefit analysis.</p> <p>Conducting interviews/focus groups with MA/beneficiaries and field visits;</p> <p>Cabinet study — review of documents, case studies;</p> <p>Randomised Control Trial;</p> <p>Matching;</p> <p>Counterfactual evaluation.</p>	<p>Funds (https://www.eufunds.bg/index.php/bg/);</p> <ul style="list-style-type: none"> • Normative documents at EU level — Regulations, Guidelines and EU Guidelines, etc. European documents; • MA documents, strategic documents and analyses at national level; • PE 21-27; • Methodologies for calculating the indicators of the programme. • MA documents, including methodologies and analyses; • Official statistics, information on programmes from other European countries.
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5.3 Evaluation of the effectiveness, efficiency, EU added value and impact of the measures implemented in the field of educational integration of marginalised communities such as Roma and a bottom-up approach, including support for targeted action to combat child poverty

Thematic areas for evaluation	Key evaluation questions	Main evaluation methods	Main sources of information
<p>1. Assessment of EU added value.</p> <p>2. Assessment of the degree of desegregation and secondary segregation of Bulgarian schools and the contribution of the programme.</p> <p>3. Evaluation of the impact of the complex programs at municipal level for the desegregation of schools and the contribution of the program.</p> <p>4. Evaluation of the impact of the programme measures aimed at the mobility of teachers and pupils from segregated into a non-segregated school on school retention policies.</p> <p>5. Assess the impact of intercultural education on school retention and reduce ESL rates.</p> <p>6. Assessment of educational integration of marginalised communities, including Roma through CLLD and ITI approaches and bottom-up approach.</p> <p>7. Assessment of the capacity and qualification of pedagogical specialists</p>	<ul style="list-style-type: none"> To what extent have the objectives of this intervention area been achieved? If there have been any delays or challenges in the implementation of activities, what caused them? How have the actions under this intervention contributed to changing attitudes of pedagogical professionals, parents, and other members of the education system towards marginalized communities and Roma in particular? How have the actions under this intervention contributed to changing the school environment? To what extent have desegregation, intercultural education and anti-discrimination policies helped improve student outcomes, tolerance, and social skills? To what extent do the actions under this intervention compliment other strategies for integrating marginalized communities and combatting child poverty? 	<p>Analysis of the effectiveness, efficiency and effectiveness of measures co-financed under the ESF+ in the field of educational integration of marginalised communities such as Roma;</p> <p>Analysis of the data obtained by the Ministry of Education in connection with the annual monitoring of the educational performance of pupils as a result of the support under the RO 2021-2027;</p> <p>Theory of change;</p> <p>Results-oriented monitoring (Results-Oriented Monitoring);</p> <p>Comparative analysis of data on the implementation of the implemented measures at SWR and other regions.</p>	<p>Documents of the MA;</p> <ul style="list-style-type: none"> Handbook on the management and implementation of PE; Application guidelines and their annexes; Reports from evaluations of the effectiveness, efficiency and impact of procedures aimed directly or indirectly at marginalized groups such as the Roma, under Priority Axis 3 “Educational Environment for Active Social Inclusion” of Operational Programme “Science and Education for Smart Growth” 2014-2020; EAPA website (http://sf.mon.bg/);



<p>and non-pedagogical staff, including educational mediators for working in a multicultural educational environment following support of the program.</p> <p>8. Evaluation of the reasons for dropping out of education of students from vulnerable and marginalised groups, including Roma.</p> <p>9. Assessment of the impact of training of parents of students from marginalised communities, including Roma on their attitudes for education.</p> <p>10. Assessment of the adequacy, effect and applicability of the trainings and information campaign to overcome negative public attitudes.</p> <p>11. Assessment of demographic, social and cultural barriers to access to education.</p> <p>12. Regional impact assessment.</p> <p>13. Assessment of the difficulties in implementing the activities and the contribution of the measures to the implementation of the objectives set out in the programme and the normative and strategic documents in the field of education and their action plans.</p>	<ul style="list-style-type: none"> To what extent and how has the programme helped overcome demographic, social and cultural barriers that have a negative impact on access to education? 	<p>Analysis of the impact of investments (national, ESIF, others)</p> <p>Process evaluation and process evaluation;</p> <p>Method of triangulation.</p> <p>Cost-benefit analysis.</p> <p>Cabinet study — review of documents, case studies</p> <p>A cost-benefit analysis;</p> <p>Conducting interviews/focus groups with MA/beneficiaries and field visits;</p> <p>Randomised Control Trial;</p> <p>Matching;</p> <p>Counterfactual evaluation.</p>	<ul style="list-style-type: none"> UMIS, website of the single information portal on the Structural Funds (https://www.eufunds.bg/index.php/bg/); Normative documents at EU level — Regulations, Guidelines and EU Guidelines, etc. European documents; MA documents, strategic documents and analyses at national level; PE 21-27; Methodologies for calculating the indicators of the programme. MA documents, including methodologies and analyses; Official statistics, information on programmes from other European countries.
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14. Assessment of the sustainability of results (including the products created under the project(s))			
5.4 Evaluation of the effectiveness, efficiency, EU added value and impact of the measures implemented in implementing PE in the field of digitalisation and the implementation of the competence model in education.			
Thematic areas for evaluation	Key evaluation questions	Main evaluation methods	Main sources of information
<p>1. Assessment of EU added value.</p> <p>2. An assessment of the adequacy and feasibility of the methods introduced under the Programme for teaching and implementing key competences under the European Reference Framework for Key Competences for Lifelong Learning.</p> <p>3. Evaluation of the programme's contribution to improving the quality and relevance of the examination materials for internal and national external evaluation and the system of tools for measuring the achievement of basic learning outcomes.</p> <p>4. Assessment of practical skills acquired in the course of support under the program for upskilling teachers, school leaders and SWR experts for applying the competency approach.</p>	<ul style="list-style-type: none"> • To what extent have the objectives of this intervention area been achieved? If there have been any delays or challenges in the implementation of activities, what caused them? • To what extent are teachers, school leaders and other school pedagogical staff prepared to implement the competence model in education? • What effect has the intervention area had on the instruction and assessment practices in schools? Have practices become more competence-based? • What effect has the intervention area had on the digital skills of pedagogical staff and students? • How have the actions under this intervention contributed to the creation 	<p>An analysis of the effectiveness, efficiency and effectiveness of the measures co-financed under the ESF+ in the field of digitalisation and the implementation of the competence model;</p> <p>Analysis of the data obtained by the Ministry of Education in connection with annual monitoring in the field of digitalisation and the implementation of the competence model in education resulting from the support under the RO 2021-2027;</p> <p>Theory of change;</p>	<ul style="list-style-type: none"> • Documents of the MA; • Handbook on the management and implementation of PE; • Application guidelines and their annexes; • Performed procedures under OPSESG „Education for tomorrow“ and „Equal access to school education in times of crisis“ • An EA PA website (http://sf.mon.bg/);



<p>5. Assessment of educational outcomes achieved as a quantitative indicator (participation in trainings, exam assessments, etc.) by pupils in the eight key competences (linguistic literacy, multilingual competence, mathematical competence and competence in science, technology and engineering, digital competence, personal competence, social competence and competence to acquire learning skills, civic competence, entrepreneurial competence, and competence for cultural awareness and expression).</p> <p>6. Assess the degree of deployment of digital innovative solutions and teaching and assessment in school education.</p> <p>7. Assess the enhancement of digital competences and skills and competences regarding the green economy of pedagogical professionals, pupils and parents.</p> <p>8. Assessment of the inclusion in training of pupils from vulnerable groups and marginalised groups, including Roma, to acquire digital skills.</p> <p>9. Evaluate the network of STEM cabinets and involve students in them. Results achieved.</p>	<p>and implementation of an innovation culture in kindergartens and schools?</p>	<p>Results-oriented monitoring (Results-Oriented Monitoring);</p> <p>Comparative analysis of data on the implementation of the implemented measures at SWR and other regions.</p> <p>Analysis of the impact of investments (national, ESIF, others)</p> <p>Cabinet study — review of documents, case studies</p> <p>Process evaluation (process evaluation)</p> <p>Analysis based on theory</p> <p>Method of triangulation</p> <p>Cost-benefit analysis.</p> <p>Conducting interviews/focus groups with MA/beneficiaries and field visits;</p> <p>Randomised Control Trial;</p> <p>Matching;</p> <p>Counterfactual evaluation.</p>	<ul style="list-style-type: none"> • UMIS, website of the single information portal on the Structural Funds (https://www.eufunds.bg/index.php/bg/); • Normative documents at EU level — Regulations, Guidelines and EU Guidelines, etc. European documents; • MA documents, strategic documents and analyses at national level; • PE 21-27; • Methodologies for calculating the indicators of the programme. • MA documents, including methodologies and analyses; • Official statistics, information on programmes from other European countries.
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<p>10. Evaluation of the effectiveness of the information systems and databases put in place in the education system.</p> <p>11. Regional impact assessment.</p> <p>12. Assessment of the difficulties in implementing the activities and the contribution of the measures to the implementation of the objectives set out in the programme, the normative and strategic documents in the field of education and their action plans.</p> <p>13. Assessment of the sustainability of results (including the products created under the project(s))</p>			
<p>5.5 Evaluation of the effectiveness, efficiency, EU added value and impact of the measures implemented in the field of vocational education and training</p>			
<p>Thematic areas for evaluation</p>	<p>Key evaluation questions</p>	<p>Main evaluation methods</p>	<p>Main sources of information</p>
<p>1. Assessment of EU added value.</p> <p>2. Assess the development of skills for the professions of the present and the future.</p> <p>3. Evaluation of Centres of Excellence in VET.</p> <p>4. Evaluation of the dual training system in VET.</p> <p>5. Assessment of the modernisation of VET curricula.</p>	<ul style="list-style-type: none"> To what extent have the objectives of this intervention area been achieved? If there have been any delays or challenges in the implementation of activities, what caused them? How has the intervention area contributed to changes in the labour market relevance of vocational education and training programmes? 	<p>An analysis of the effectiveness, efficiency and effectiveness of measures co-financed under the ESF+ in the field of vocational education and training;</p> <p>Analysis of the data obtained by the Ministry of Education in connection with the annual monitoring of the educational performance of pupils as a</p>	<ul style="list-style-type: none"> Documents of the MA; Handbook on the management and implementation of PE; Application guidelines and their annexes; <p>Performed procedures unde OPSESG</p>



<p>6. Assessment of key competences in the apprenticeship of students.</p> <p>7. Assessment of the involvement of employers in the preparation of curricula and practical preparation of students.</p> <p>8. Assessment of upskilling due to the programme support of VET teachers and teachers. Assessment of the impact of the partnership with business and HEIs in the promotion and.</p> <p>9. Assessment of additional training courses, mentoring and induction modular trainings on the quality of vocational training of students.</p> <p>10. Assessment of the transition of VET to digital and green economy, blue growth, industry 5.0, ESIS.</p> <p>11. Regional impact assessment.</p> <p>12. Assessment of the difficulties in implementing the activities and the contribution of the measures to the implementation of the objectives set out in the programme, the normative and strategic documents in the field of education and their action plans.</p> <p>13. Assessment of the sustainability of results (including the products created under the project(s))</p>	<ul style="list-style-type: none"> • How have dual-training systems and apprenticeships changed under this intervention? Have any of the changes led to improvements for vulnerable groups? • To what extent do the actions under this intervention area improve the quality of the future workforce and facilitate students to work in the digital and green economy? • To what extent do the actions under this intervention compliment other strategies for improving the quality of vocational education and training? 	<p>result of the support under the RO 2021-2027;</p> <p>Theory of change;</p> <p>Results-oriented monitoring (Results-Oriented Monitoring);</p> <p>Comparative analysis of data on the implementation of the implemented measures at SWR and other regions.</p> <p>Analysis of the impact of investments (national, ESIF, others)</p> <p>Process evaluation and process evaluation;</p> <p>Analysis based on theory;</p> <p>Method of triangulation.</p> <p>Cost-benefit analysis.</p> <p>Cabinet study — review of documents, case studies</p> <p>Conducting interviews/focus groups with MA/beneficiaries and field visits;</p> <p>Randomised Control Trial;</p> <p>Matching;</p> <p>Counterfactual evaluation.</p>	<p>„Internships for Students phase 1“ , „Internships for Students -2“ and „Support for the dual training system“</p> <ul style="list-style-type: none"> • EAPA website (http://sf.mon.bg/); • UMIS, website of the single information portal on the Structural Funds (https://www.eufunds.bg/index.php/bg/); • Normative documents at EU level — Regulations, Guidelines and EU Guidelines, etc. European documents; • MA documents, strategic documents and analyses at national level; • PE 21-27; • Methodologies for calculating the indicators of the programme. • MA documents, including methodologies and analyses;
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- Official statistics, information on programmes from other European countries.

5.6 Evaluation of the effectiveness, efficiency, EU added value and impact of the measures implemented in the field of higher education

Thematic areas for evaluation	Key evaluation questions	Main evaluation methods	Main sources of information
<p>1. Assessment of EU added value.</p> <p>2. Evaluation of the introduction of dual training in the HE.</p> <p>3. Assessment of the applicability of vocational guidance of students and student practices to the requirements of the labour market.</p> <p>4. Assessment of the level of upskilling of the teachers in HE for professional and personal development due to support under the program.</p> <p>5. Assessing the impact of including educational entrepreneurship and innovation in HEIs.</p> <p>6. Assess the impact of introducing a competent approach to professional careers important for the economy and the labour market.</p>	<ul style="list-style-type: none"> • To what extent have the objectives of this intervention area been achieved? If there have been any delays or challenges in the implementation of activities, what caused them? • How has the development of academic staff in higher education institutions changed under this intervention? • What effect has the intervention area had on the curricula of higher education programmes? • To what extent do the actions under this intervention area improve outcomes for higher education students, especially those from vulnerable groups? • To what extent do the actions under this intervention compliment other strategies for improving the quality of higher education? 	<p>An analysis of the effectiveness, efficiency and effectiveness of measures co-financed under the ESF+ in the field of higher education;</p> <p>Analysis of the data obtained by the Ministry of Education in connection with the annual monitoring of students' educational performance as a result of the support under the RO 2021-2027;</p> <p>Theory of change;</p> <p>Results-oriented monitoring (Results-Oriented Monitoring);</p> <p>Comparative analysis of data on the implementation of the implemented measures at SWR and other regions.</p>	<ul style="list-style-type: none"> • Documents of the MA; • Handbook on the management and implementation of PE; • Application guidelines and their annexes; • Performed procedures under OPSESG „Student Practices - Phase 1“, Student Practices - 2“, „Modernization of higher education institutions“.



<p>7. Assessment of access of vulnerable and marginalised groups, including Roma to HE.</p> <p>8. Assessing the integration into the educational process of key issues such as Industry 5.0, Green Transition, Blue Growth and ISIS.</p> <p>9. Assessment of the regional impact of the procedure.</p> <p>10. Assessment of the difficulties in implementing the activities and the contribution of the measures to the implementation of the objectives set out in the programme, the normative and strategic documents in the field of education and their action plans.</p> <p>11. Assessment of the sustainability of results (including the products created under the project(s))</p>		<p>Analysis of the impact of investments (national, ESIF, others)</p> <p>Process evaluation and process evaluation;</p> <p>Analysis based on theory;</p> <p>Method of triangulation.</p> <p>Cost-benefit analysis.</p> <p>Cabinet study — review of documents, case studies</p> <p>Conducting interviews/focus groups with MA/beneficiaries and field visits;</p> <p>Randomised Control Trial;</p> <p>Matching;</p> <p>Counterfactual evaluation.</p>	<ul style="list-style-type: none"> • EAPE website (http://sf.mon.bg/); • UMIS, website of the single information portal on the Structural Funds (https://www.eufunds.bg/index.php/bg/); • Normative documents at EU level — Regulations, Guidelines and EU Guidelines, etc. European documents; • MA documents, strategic documents and analyses at national level; • PE 21-27; • Methodologies for calculating the indicators of the programme. • MA documents, including methodologies and analyses; • Official statistics, information on programmes from other European countries.
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