



Performance of Impact Evaluation of
the IPA Cross-border Programmes
2007-2013, managed by the Republic
of Bulgaria

Impact Evaluation Report

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DISCLAIMER & ACKNOWLEDGEMENT

Disclaimer

This document has been prepared for DG “Territorial Cooperation Management” within the Ministry of Regional Development and Public Works (MRDPW), and is aimed at performing impact evaluation of the IPA cross-border programmes 2007-2013, managed by the Republic of Bulgaria.

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GLOSSARY OF ACRONYMS

BCO	Bulgarian Consultancy Organization Ltd.
B2B	Business-to-Business
CBC	Cross-border Cooperation
CF	Cohesion fund
CSOs	Civil Society Organisations
EC	European Commission
ERDF	European Regional Development Fund
ESF	European Social Fund
EU	European Union
EUR	euro
EUSDR	EU Strategy for Danube Region
GIS	Geographical Information Systems
GPS	Global Positioning System
GR	Greece
IPA	Instrument for Pre-accession Assistance
JMC	Joint Monitoring Committee
JTS	Joint Technical Secretariat
LP	Lead Partner
MA	Managing Authority
MK¹	former Yugoslav Republic of Macedonia
MRDPW	Ministry of Regional Development and Public Works of Bulgaria
NA	National Authority
NGO	Non-Government Organization
NUTS	Nomenclature of Territorial Units for Statistics
PA	Priority Axis
PPT	Power Point Presentation
RDAs	Regional Development Agencies
RO	Romania
RS	Serbia
SMEs	Small and Medium Enterprises
TR	Turkey
XLS	Excel workbook

¹ EUROSTAT: 'MK' is a provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations. (http://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Country_codes)



PROJECT IDENTIFICATION

Programme Name	Bulgaria – Serbia IPA Cross-border Programme 2007-2013 (CCI Number 2007CB16IPO006) Bulgaria – the former Yugoslav Republic of Macedonia IPA Cross-border Programme 2007-2013 (CCI Number 2007CB16IPO007) Bulgaria – Turkey IPA Cross-border Programme 2007-2013 (CCI Number 2007CB16IPO008)	
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EXECUTIVE SUMMARY

The new programming period 2014–2020 brought some fundamental new requirements for the future EU-funded programmes, i.e. they are expected to demonstrate that projects will have a direct, positive and measurable impact on the programme area. In light of these new requirements, the new IPA CBC programmes are aimed to take stock of what has been achieved in the previous (2007-2013) programming period in terms of project outputs, results and impact. Hence, the present evaluation report provides both a retrospective view by documenting and evaluating the legacy of the IPA CBC Programmes (2007-2013), and a forward-looking view, by drawing lessons that can be taken into the next programme period.

PURPOSE AND SCOPE OF THE EVALUATION

The impact evaluation of the IPA Cross-border Programmes 2007-2013, managed by the Republic of Bulgaria, was aimed at **elaboration of an analysis of the level of achievement of programmes output and result indicators and their compliance with the set programmes' targets**, as well as conducting of a **thorough analysis of long-term impacts of Programmes' interventions and comparative analysis of the Programmes' impacts**. It also provides **recommendations for more result-oriented Programmes/projects for the 2014-2020** period through summarizing lessons learned from Programmes/projects implementation 2007-2013 and collecting best practices/examples of successful projects.

This evaluation was commissioned by the Directorate-General "Territorial Cooperation Management" within the Ministry of Regional Development and Public Works (Bulgaria).

The programmes covered by this evaluation are:

- **Bulgaria – Serbia IPA Cross-border Programme 2007-2013** (CCI Number 2007CB16IPO006);
- **Bulgaria – the former Yugoslav Republic of Macedonia IPA Cross-border Programme 2007-2013** (CCI Number 2007CB16IPO007);
- **Bulgaria – Turkey IPA Cross-border Programme 2007-2013** (CCI Number 2007CB16IPO008).

THE METHODOLOGY

When designing a programme, Managing Authorities are requested to explain how allocating funds will produce outputs through which intended results are to be achieved (the expected change). This theory of change has to take on board the economic and political context of the programme as well as other factors (social, cultural, institutional...) that may influence the mechanisms leading to the results.

Understanding why and under what conditions the three IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, produced effects was of utmost importance for the evaluation team. The application of a **"theory-based" impact evaluation approach**, hence, gave ground to assess if the three Programmes worked, how they worked and in which context at the same time. The evaluation was carried out between April 2016 and November 2016 in three steps, namely:

- *Collecting data and drawing-up findings concerning Programmes' results achievement in relation to the targets set for each priority axis.* It covered examination of every Programme implementation and providing evidence of the level of achievement of initially set Programme's target expressed in qualitative and quantitative terms; estimating the projects achievements in terms of Programme outputs and results indicators for the respective priority axis and measures/sphere of interventions; defining the main type of beneficiaries and target groups actively involved and/or interested in the programmes implementation, and the preferable themes of cooperation under the Programmes.
- *Elaborating the impact evaluation of the IPA Cross-border Programmes 2007-2013.* This step comprises detailed analysis of long-term impacts of each Programmes intervention as well as their intended and unintended effects on the Programmes' territories. For the above, a combination of methods have been mobilised, namely: 100% projects' review; e-surveys among three major target groups (e.g. key programme's stakeholders, project partners and general public); field visits to projects partners (out of which 21 case studies have been elaborated). The evaluation team has also elaborated a comparative analysis of the Programmes' identified impact on the regional development of the cross-



border regions and on the Programmes' beneficiaries, and target groups.

- *Drawing-up recommendations on Programme and project level which could facilitate the future projects planning and to ensure sustainability of the results.* In alignment with the evidence-based and utilization-focused approach of this impact evaluation, the evaluation team elaborated preliminary drafts of findings, conclusions and areas of recommendation (within 3 separate evaluation reports - one for each Programme). In October 2016, the team have also organized a final stakeholder workshop as to discuss the findings of the evaluation and confront them with the views of experts and practitioners.

MAJOR EVALUATION FINDINGS

The peripheral location of border regions, often a cause for underdevelopment, is calling for actions which have the potential to turn this disadvantage into an opportunity. Joint cooperation and activities between regions are the key instrument for achieving the objectives of growth and competitiveness, for establishing partnerships and for promoting new models of development, thus the effects of such initiatives should not be underestimated.

In this context, the three **IPA CBC Programmes (2007-2013)**, managed by the Republic of Bulgaria, were intended at both development and integration of the border areas between **Bulgaria - Serbia, Bulgaria – Turkey and Bulgaria – the former Yugoslav Republic of Macedonia**. With the spent budget of about EUR 87.9 million and 393 funded cross-border cooperation projects, the Programmes have pursued a highly results-oriented approach, focusing on the delivery of concrete products and services, which had a real effect on peoples' daily lives and on the competitiveness of businesses in the bordering locations.

Largely appropriate, but too optimistic co-operation objectives

The priorities defined under each of the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, have covered the whole range of actions and priorities as defined in the EU regulations. This respectively led to the fact **that strategies were rather wide and with little prioritization between objectives**. The "priorities" of the Programmes were often an aggregation of number of interventions under broad multi-faceted headings.

The EU Regulation (1085/2006) additionally ambioned the **contribution of IPA CBC programmes to economic integration and strengthened competitiveness** of the border regions. In this respect, the evaluation found that cross-border cooperation projects have been largely focused on improving protection of natural resources and more effective risk prevention as well as to easing transport accessibility or access to public services, but these contributions remained at a rather local level and without generating clear effects on the territory as a whole. Thus, it can be concluded that the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, were primarily **focused on addressing common challenges and less on creating new opportunities linked to the exploitation of complementary assets over the borders**.

Key achievements

The Programmes have **achieved positive outcomes, which clearly shows that the dynamics of the bilateral collaboration led to intensity of cooperation** among local stakeholders and to an increased interest in implementing common cross-border initiatives for sustainable development of the bordering regions. The achievements encompass:

- ❖ INCREASED GOVERNANCE CAPACITY AND IMPROVED POLICIES through development of joint strategic documents and exchange of best practices and know-how.
- ❖ IMPROVED PHYSICAL AND INFORMATION INFRASTRUCTURE addressing the social and economic development in the regions through the implemented small-scale infrastructural projects for rehabilitation/construction of information, social infrastructure and business, and innovation facilities.
- ❖ BETTER PRESERVED NATURAL RESOURCES AND BIODIVERSITY as a result of permanent networks for environment protection and reasonable utilisation of natural resources, as well as IMPROVED/DEVELOPED EARLY WARNING AND RISK MANAGEMENT SYSTEMS as a result of partnerships for cases of natural man-made disasters created.
- ❖ STRENGTHENED POTENTIAL FOR TOURISM DEVELOPMENT through sustainable utilisation of regional resources (natural and cultural assets) as well as exchange and transfer of know-how.
- ❖ ENHANCED SUSTAINABLE ECONOMIC DEVELOPMENT OF THE BORDER REGION AND INCREASED COMPETITIVENESS OF SMALL AND MEDIUM ENTERPRISES (SMEs) by establishing joint information services and encouraging contacts across the border.



- ❖ IMPROVED SOCIAL COHESION through establishment of new partnerships and networks promoting social and cultural inclusion across borders, as well as supporting investments in public health and social services.

A large number of small-scale infrastructures were built or supported; a number of environmental infrastructures and communication infrastructures were newly established or supported; and many services were either been newly created or improved in various fields (i.e. institutional, technological, administrative, transport-related, tourism, social, health). Also a considerable number of natural, cultural, urban and rural tourist sites or routes were newly established or supported. Turning to the various institutional, informational and educational outputs achieved, nearly 16 000 participants were involved in joint projects' activities and events, incl. training courses/trainings, some 1 700 SMEs participated in information events, business-to-business meetings, trainings and other project activities, and more than 1 400 institutions/ bodies participated in actions.

At the level of the aggregated results, the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, **produced effects in three major areas of change (performance-, integration- and investment-related results)**. The evaluation evidence confirms that the impact of the Programmes was strongest in relation to those themes primarily addressed by the programme strategies, where soft co-operation or physical investments generated **direct effects and lasting improvements**. They have also achieved an impact in relation to both elements of their wider policy agenda (i.e. territorial development and co-operation), mainly through the institutional/networking and socio-economic outcomes. The territorial proximity of the various actors further facilitated a diversified and intense co-operation to tackle issues of cross-border relevance. This led to a thematically wide-ranging and also immediate (visible) impact on the development of the cross-border areas.

Physical investments were important drivers to generate a territorial development impact, but only if they had a real cross-border relevance. The Programmes undertook, however, mostly small-scale infrastructure investments (e.g. building and multilingual signs for hiking / cycle paths, renovation of historical monuments and buildings, equipment of established joint facilities, environmental rehabilitation measures, etc.) with sustainable local improvements. A more substantial cross-border impact was observed in few cases where a strong cross-border benefit was demonstrated (e.g. flooding prevention and water management systems for larger river-catchment areas).

Soft co-operation outcomes were equally important drivers to generate a territorial development impact, but only if they established a joint & durable problem solving capacity. The evaluation analysis has shown that the operations producing 'soft' co-operation outcomes generated clear direct effects in the programme areas and helped to solve problems or contributed to better addressing joint development opportunities. The significance of the direct effects achieved by 'soft' cooperation, however, was strongly determined by the very nature of the issues addressed, namely: (1) in the case of local/regional issues for which a common interest existed, the improvements achieved were of relatively low cross-border significance if they did not also involve the generation of more comprehensive cross-border cooperation policy concepts; and (2) in the case of issues with a cross-border relevance, 'soft' co-operation outcomes achieved important improvements. This was especially valid if largescale project partnerships covering the entire programme area or a more extended sub-zone within the programme areas tackled such issues or if thematic project clusters jointly achieved lasting improvements in a larger part of the programme areas.

The impact evaluation has shown, however, that the Programmes usually addressed problems or development challenges which required a more permanent or on-going action to be tackled effectively. Hence, 'soft' co-operation had to involve **establishing joint and durable problem-solving capacity** in a programme area to achieve lasting improvements and a more substantial territorial development impact. The wide range of informal and formal co-operation networks and structures which bring together a wide range of actors from the public, semi-public and private-sector were, therefore, an important starting point for creating such a capacity.

Added value on co-operation

IPA CBC Programmes 2007-2013, managed by the Republic of Bulgaria, generally **improved the depth and intensity of cross-border co-operation at a strategic level**. They have generated a noticeable socio-cultural added value whereas the wider socio-economic and political-institutional added value was limited.

The Programmes' support often brought about a visible **socio-cultural added value**, which would not have emerged without Community funding or only much later. Cultural projects, and in particular the many micro-projects supporting people-to-people activities, made a strong contribution. They increase the mutual knowledge/awareness about shared historical roots and cultural assets or favoured direct interpersonal contacts which helped both sides get to know each other and build up mutual trust.

The **socio-economic added value** caused by the Programmes' support was relatively small. More noticeable achievements have been observed in the field of cross-border tourism development, while improvements in the field of cross-border business-



development and cross-border labour market development were not so substantial. This was either due to the fact that such projects were rare or because they were spread over relatively large co-operation area but with scarce budgets.

Considered from a more strategic viewpoint, the wider **political-institutional added value** generated by the Programmes' support was uncertain during the period 2007-2013. In a few cases only, the existing cross-border structures were directly linked to strategic programme-level processes. IPA CBC support had, however, created in most cases at least a broader awareness of cross-border co-operation both as an opportunity and as a joint (political) responsibility. It sometimes also contributed to increase the visibility of / awareness about Community policies and principles, and helped to overcome domestic institutional passivity and at a certain extent also administrative and institutional barriers in the bilateral co-operation.

At project-level, however, the three Programmes contributed significantly to the **establishment of cross-border networks and long-term partnership frameworks**. These networks constitute a starting point for building up a more joint and durable problem-solving capacity in the future.

Important soft leverage effects

IPA CBC Programmes 2007-2013, managed by the Republic of Bulgaria, **generated important soft leverage effects in terms of actor mobilisation, increased inter-cultural understanding and development of social capital**. The evaluation analysis shows that operations supported by the Programmes directly mobilised a large number of individuals and organisations coming from different levels of government and various sectors. Co-operation and exchange among actors from different countries and professional backgrounds significantly improved intercultural and cross-sector understanding.

This was particularly important in the non-EU Member States where previous experience with territorial co-operation was still unsteady during the period 2007-2013. The contribution of the Programmes to further intensifying cross-country inter-cultural understanding at a grassroots level was significant. Social capital was built up through the individual and organisational learning effects associated with programmes- and projects-level co-operation, which would not have existed without the Community support. The experience gained and the new knowledge acquired were used by the actors involved during and after the lifetime of a project/programme to improve individual skills and capacities, changing organisational contexts and procedures and developing further the quality and depth of cooperation.

RECOMMENDATIONS FOR MORE RESULT-ORIENTED PROGRAMMES/PROJECTS AFTER 2013

- ❖ The Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, should more **pro-actively steer the bottom-up demand** of future project proposals with a view to achieving a more visible overall programme impact (i.e. "anticipatory management" of the project portfolio).
- ❖ A **standard catalogue of types of interventions** and impact areas of cross-border programmes might be elaborated, which could serve as a tool of evaluation and monitoring of Programmes' resources on selected priority areas, and which could also become a basis for construction of the system of indicators.
- ❖ A **uniform indicators' system** should be developed giving ground for common understanding to the projects and programmes indicators and for thorough monitoring of progress of the Interreg-IPA Programmes (2014-2020) implementation. The system should be created on the basis of a standard catalogue of types of intervention, while making a clear differentiation between programmes' and projects' indicators. Beneficiaries should exclusively use indicators from the adopted system and should be obliged to report them.
- ❖ Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, should adopt a more proactive approach to ensuring that their future operations are durable and that, if possible, **projects become self-sustaining** after the end of EU-funding.
- ❖ Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, should focus assistance to **actions that bring clear cross-border added value** - for example: increasing cross-border competitiveness through innovation and research and development; connecting intangible networks (services) or physical networks (transport) to strengthen cross-border identity as a feature of European citizenship; promotion of cross-border labour market integration; and cross-border water management and flood control.
- ❖ Further **stimuli should be searched for enlarging the projects partners' representation** in the Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, especially such from less developed regions as well



as smaller municipalities and settlements. It could also be thought of providing stimuli for potential applicants without specific “EU project” experience (but with specific such in other fields relevant for the projects) to also join the unique opportunity of cross-border partnership and cooperation.

- ❖ It could be further thought on introducing certain **limitations for number of projects per organisation** to be funded within one programming cycle. This would give better chances to wider potential applicants to take part in the Programmes.
- ❖ Further efforts should be placed in **upgrading the project management skills and competences** of project beneficiaries.
- ❖ Further (via interventions funded) **strengthening integration and harmonisation** between the partnering countries is needed. This is especially valid as regards the pressing agendas in light of EU accession and mostly in terms of adoption of *acquis communautaire* by the candidate countries.
- ❖ The Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, should – if not already undertaken – establish a more pro-active and ongoing inter-action with the convergence and regional competitiveness and employment programmes, as well as with other territorial co-operation programmes, operating in their co-operation areas. This would help to **ensure complementary, co-ordination and synergy** (e.g. joint thematic workshops/seminars, regular participation of programme delegates in Monitoring Committee meetings of other programmes, etc.).
- ❖ Programmes’ management structures should continue implementing the mechanism for avoiding duplication of already financed activities, and to finance those which have the capacity for **valorisation and multiplication of previously achieved results**, and which introduce innovative methodologies with clear cross-border added value and a higher territorial impact.
- ❖ **“Knowledge capitalisation”** of programmes’ outputs is considered a good starting point not only to set up the future policy learning platforms, but also for the new (2014-2020) programmes to take use of the previous results as a benchmark for assessing applications, in terms of determining their innovative character and added value.



I. INTRODUCTION

Over the period of 2003-2013 specific bilateral cross-border co-operation programmes between Bulgaria and EU External Borders' Partnering Countries have been implemented with the support of EU financial assistance as well as national co-financing. As a Member State of the European Union since 1st January 2007, the Republic of Bulgaria has taken over the responsibility for management and control of IPA Cross-border Programmes with Serbia, the former Yugoslav Republic of Macedonia and Turkey. All programmes implemented so far were in line with the idea that border regions are often facing disadvantages due to their peripheral geographical locations and relative isolation from national economies. At the same time, the development of European Union's internal market (along with the four freedoms, namely, free movement of people, goods, services and capital) also brought out the need for the sustainable and balanced development and integration of the whole European territory.

On the other side, cross-border cooperation component within Instrument for Pre-accession Assistance (IPA) has the task of promoting good neighbourly relations, fostering stability, security and prosperity in the mutual interest of all countries concerned, and encouraging their harmonious, balanced and sustainable development. Hence, the cross-border cooperation programmes are aimed to support European integration processes by establishing cross-border infrastructure of local or regional relevance, coordinating or joining the provision of services in cross-border areas, promoting community integration across borders.

In line with the above, IPA cross-border programmes are further intended to provide assistance to the accession countries in terms of building up and strengthening institutional capacity for managing EU financial instruments (i.e. Structural Funds) in view of their forthcoming EU membership. To this end, IPA II was meant to support eligible territories or programme areas in adopting and implementing the political, institutional, legal, administrative, social and economic reforms required so as to help accession countries in a broader context to comply with the European Union's values and to progressively align to the Union's rules, standards, policies and practices with a view to membership. Amongst others, IPA II pursued to achieve some specific objectives including the support for political reforms, support for economic, social and territorial development aiming at smart, sustainable and inclusive growth, strengthening institutional ability at all levels to fulfil membership obligations by supporting progressive alignment with, adoption, implementation and enforcement of the *acquis communautaire* including the preparation for managing structural instruments and last but not least, strengthening regional integration and territorial cooperation.

For the programming period 2007-2013, the Republic of Bulgaria and its neighbouring IPA beneficiary countries have been jointly implementing:

- **Bulgaria – Serbia IPA Cross-border Programme 2007-2013** (CCI Number 2007CB16IPO006);
- **Bulgaria – the former Yugoslav Republic of Macedonia IPA Cross-border Programme 2007-2013** (CCI Number 2007CB16IPO007);
- **Bulgaria – Turkey IPA Cross-border Programme 2007-2013** (CCI Number 2007CB16IPO008).

The Impact evaluation, hence, has been focused on capturing the effects of the three Programmes as regards their objectives and targets. In addition, the evaluation built a specific knowledge on their impact and sustainability and could be used as a useful tool for steering a more result-oriented implementation of the Interreg-IPA Programmes for the period 2014-2020.

The evaluation exercise covered the Programmes implementation within the period from 1st January 2007 to 31st December 2015.



II. CONTEXT OF THE IMPACT EVALUATION

In the programming period 2014-2020, Cohesion Policy pursues a result-oriented policy in order to better contribute to the Europe 2020 Strategy. This stronger focus on achieving the (expected) results is also a basis for monitoring and evaluation, which however should capitalise on the results and impacts achieved during the 2007-2013 programming period.

2.1 Objectives and scope of the evaluation

In view of the above, the Ministry of Regional Development and Public Works has assigned the performance of an impact evaluation of the IPA Cross-border Programmes 2007-2013, managed by the Republic of Bulgaria, aimed at **elaboration of an analysis of the level of achievement of programmes output and result indicators and their compliance with the set programmes' targets**, as well as conducting of a **thorough analysis of long-term impacts of Programmes' interventions and comparative analysis of the Programmes' impacts**. The evaluation report also propose **recommendations** for more result-oriented Programmes/projects for the 2014-2020 period through summarizing lessons learned from Programmes/projects implementation 2007-2013 and collecting best practices/examples of successful projects.

2.2 Methodology of the evaluation

The present impact evaluation was aimed to clarify *“if”* and *“why”* a change occurred, and hence, the *“theory of change”* approach supported the analysis in several ways, namely by identifying:

- **specific evaluation questions**, especially in relation to those elements of the *“theory of change”* for which there is no substantive evidence yet;
- **relevant variables** that were included in data collection;
- **intermediate outcomes** that could be used as markers of success in situations where the impacts of interest will not occur during the time frame of the evaluation;
- **aspects of implementation** that need to be examined;
- (potentially) **relevant contextual factors** that were addressed in data collection and in analysis.

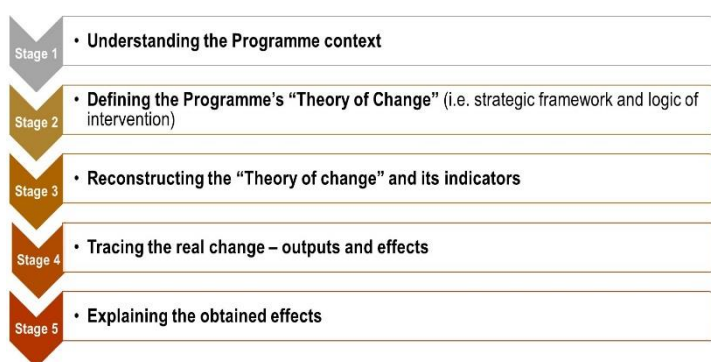


Figure 1 Five-stages approach to impact evaluation of the IPA CBC Programmes (2007-2014), managed by the Republic of Bulgaria

The starting point for the impact evaluation analysis was to **understand the context** – the policy field, the spatial and socio-economic situation in which the IPA CBC Programmes (2007-2013) have been operating, as well as problem identification and scope of impact evaluation determination. Additionally, it has been deeply explored the baseline situation at the start of the Programmes, namely: which changes were

foreseen (direct, indirect, other impacts), but also by what kind of interventions the Programmes foreseen to achieve such changes?

Secondly, the Evaluation Team have tried to grasp and articulate the **Programmes' intervention logic** (i.e. the initial *“theory of change”*, or *“if we do... than we get...”*), and also identify the assumptions or inspirations that became a cornerstone of the Programmes' strategies.

Next, the causal assumptions of the Programmes' strategy have been defined, and thus understanding how the effects in each field of activity (i.e. priorities, actions) could be measured, but also understand whether the expected effects have been defined and described in terms of concrete indicators. This was the most crucial stage for the whole impact evaluation research, and led to formulation of a **reconstructed “theory of change”**, based on which the evaluation findings were transformed into conclusions and recommendations.



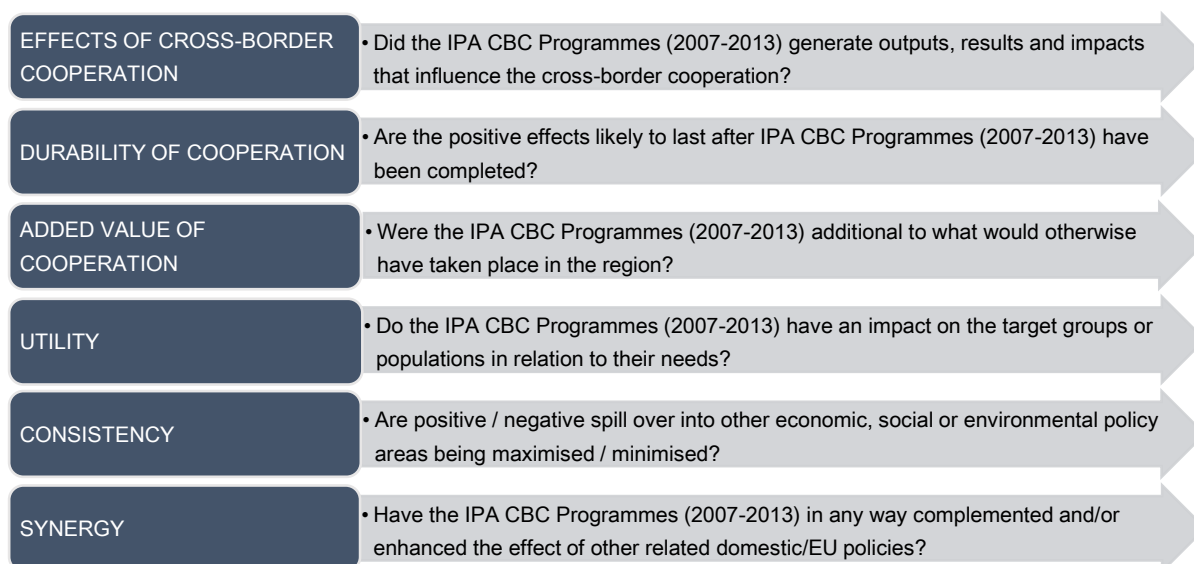
After having defined the evaluation framework, the Evaluation Team put its efforts on **tracing the real change** – i.e. the real (that were obtained) outputs of the Programmes and the real (expected and unexpected) results of the Programmes. Tracing effects (results and impact) was the most challenging and time-consuming part of the evaluation undertaken as it was required to find out the real-life proves for the “*theory of change*”, or the causal relation that connects actions & outputs with results and the wider, structural change (impact).

And finally, the task of the Evaluation Team was to explain the **determinants of change** – i.e. to find out what are the factors that explain the obtained effects of the Programmes. For this, three sets of hypotheses were taken into account:

- The **context** hypothesis, covering the elements of Programmes’ environment (socio-economic situation, social and environmental constrains, etc.).
- The **delivery mechanism** hypothesis, representing verification to what extend “*theory of implementation*” worked in practice (e.g. how inputs have been transferred into products).
- The **characteristic of beneficiaries**, their institutional and organisational constrains and capabilities.

The above 5-stage procedure, hence, was treated as **a roadmap for the particular impact evaluation analysis**. Based on that, and in view of simplifying the final evaluation findings and recommendations, an enhance **Evaluation Framework** has been agreed, while formulating **6 major evaluation issues** to be analysed, with corresponding **6 key evaluation questions** to be answered. However, each of the 6 key evaluation questions have been substantiated by **a set of sub-questions**.

Figure 2 Impact evaluation framework



To strengthen the validity of the impact evaluation’s findings and conclusions, the Evaluation Team took use of a mix of data sources and data collection strategies.

In-depth desk study and literature review

Various key documents have been reviewed and relevant data were extracted as to validate evaluation findings. These included: general background documentation and websites, strategy documents, policy documents, relevant reports, Programmes’ management files, as well as monitoring and evaluation reports, namely:

- The 3 IPA CBC Programmes (2007-2013);
- IPA Regulations 2007-2013;
- IPA Programmes Manual (management and control system description);
- Ex-ante & on-going evaluation reports;
- Guidelines for applicants, as well as other documents related with the project’s application process;



- Methodology of programmes' output and result indicators assessment;
- Data from the programmes' MIS.

As an output of this documentary review, "General Statistics" files (both XLS with tabulated results and PPP with charts and diagrams) have been elaborated, containing complete statistical overview of the Programmes.

Project's review

Additionally, the Evaluation Team has performed **100% review of projects' documentation** (i.e. application forms, project progress reports, documentary and on-the-spot monitoring reports, etc.). In total 393 projects have been checked and evaluated. In parallel to this, the Programmes' indicator system has been deeply reviewed and compared with the data collected through the projects review.

E-surveys

As to collect further data on Programmes' performance, 3 online surveys were conducted among:

- **Key programme's stakeholders** (MA / NA / JTS / JMC): in total 53 responds have been received, representing 20% of the target group. The survey was made in English.
- **Project partners**: all project partners (from both sides of the borders) have been addressed with a structured questionnaire to be completed, out of which 153 responds have been collected, representing some 31% of the target group. The survey was made in 5-lingual form (i.e. English, Bulgarian, Serbian, Macedonian and Turkish).
- **General public**: this target group have been addressed via the Programmes' web-sites as well as through the social networks. In total 177 responds have been collected. This survey was also made in 5-lingual form (i.e. English, Bulgarian, Serbian, Macedonian and Turkish).

Case studies

Within the 100% project review check-list, a separate section was devoted on identifying "good practices" among the projects implemented. Based on the results obtained, some 24 projects have been selected for further exploration on the spot, out of which 21 case studies have been elaborated. The conclusions made during these field visits have further shaped the impact evaluation results, but also gave ground for publishing a "Handbook of Good Practices" aimed at better steering the future projects development and the Programmes' implementation in the 2014-2020 period.

2.3 Capturing the impacts of cross-border cooperation – a strategic approach

As argued in the "EVALSED Update 2006"², the **process of cooperation** – i.e., "doing things together" – and the **quality of cooperation**, are as important as its effects. A simple input-output measurement, hence, cannot capture this aspect of cross-border cooperation programmes.

Therefore, during the impact evaluation process a special emphasis was given to the fact that IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, should be considered as additional ones to all other national and EC-funded programmes. This is expressed in their specific **cross-border added value**, considered in terms of:

- **Organisational and policy learning**. Good practice and learning through cross-border cooperation are effective mechanisms for spreading know-how and experience. Cross-border learning implies that actors learn to work at new scales and in new types of networks in order to address certain issues of cross-border importance better or they learn from other actors to address specific local or regional issues better.
- **Solutions to common problems**. Exchange of knowledge and experience is always present in cross-border cooperation programmes and projects, but this exchange can become even more vital when it is focused on finding solutions to common problems. Hence, cross-border cooperation brings added value by encouraging local and

² EVALSED Update 2006: Evaluation of Cross-Border and Interregional Cooperation, Karol Olejniczak, EUROREG, Warsaw University, 2006



regional actors to “think outside of the box” and in mobilizing political engagement for such issues.

- **Building structures for future cross-border cooperation.** Cross-border cooperation seeks to find new solutions to existing problems through exchange of knowledge and experience, but it also goes further to institutionalize the practices by laying the foundation for future cooperation and strengthening cohesion of the border area. This includes both administrative and institutional structures, but also even physical concrete structures of a permanent nature (such as a road, bridge, tunnel, etc.). These structures are important added value aspects of cooperation as they facilitate continuity of the lessons learned from previous projects and other cooperation forms.
- **Generating critical mass.** Cross-border cooperation is of particular value also because it ensures economies of scale and the achievement of critical mass. It involves pooling of resources in order to create common potential in the cross-border area. This is explicitly seen in projects aimed at development of new products or services.

While the cross-border added value highlights processes such as learning and thinking about new types of solutions, one of the rationale behind this evaluation research was to capture **clearly identifiable impacts** of the Programmes implemented. Cross-border impacts, then, could be defined as a marked positive effect on the targeted individuals or organisations who are the intended beneficiaries of the project’s activities or recipients, resp. users, of the project’s outputs.

Table 1 Tangible and intangible impacts examined in the impact evaluation study

Tangible Impacts	Intangible Impacts
• Improved access to services	• Building institutional capacity
• Improved access to public infrastructure	• Raising awareness
• Increased energy efficiency	• Changing attitudes and behaviour
• Reduced environmental (man-made, natural) risks	• Improving social cohesion
• Enhanced sustainability of natural, cultural and historical heritage	• Influencing policies
• Improved competitiveness, business development and job creation	• Leveraging synergies

Bringing out the unique impact the cross-border cooperation creates in the territories of subject relates to both **capturing the cross-border added value**, but also **any other significant and measurable changes** the Programmes were about to deliver. In view of that, and as to further qualify the direction of achieved change, the evaluation analysis has stepped on the 3 well-known **result characteristic**³ to territorial cooperation programmes, i.e.:

- **Integration-related results** – the change linked to establishment and implementation of joint territorial governance mechanisms for common assets, and achieving higher levels of cooperation maturity – moving from “acting as a sum” towards “acting as one”. Examples of such results are: establishment of common identity, achieving greater interaction between citizens, business, public sector, education & research communities, integrated/coordinated delivery of services, integrated/coordinated business and education frameworks, common branding, establishing frameworks for joint/coordinated management of joint assets, etc.
- **Investment-related results** – the change linked to delivering the socio-economic benefits to the cross-border cooperation area. In this case the results delivered by the Programmes should be similar to those delivered by regional development programmes subject to ERDF and ESF Regulations (i.e. filling in the development gaps of cross-border cooperation area through investment in physical, economic and social infrastructure, productive investments, investment in human resources, etc.).
- **Performance-related results** – i.e., where cooperation leads to an improvement in the quality of policies and governance; measured through capturing change in organisational and individual performance.

Furthermore, and as to synchronise the evaluation results with those of other similar research studies across Europe, the Evaluation Team decided to apply the INTERACT methodology⁴ for measuring Programmes’ achievements.

Table 2 INTERACT methodology for measuring main cross-border cooperation achievements

³ As from the INTERACT Final Report summarising the outcomes of the follow-up exercise to the ex post evaluation of INTERREG III, 30 January 2013

⁴ Typology of Interreg Projects - Measuring main project achievements across Interreg programmes in 2007-2013, INTERACT

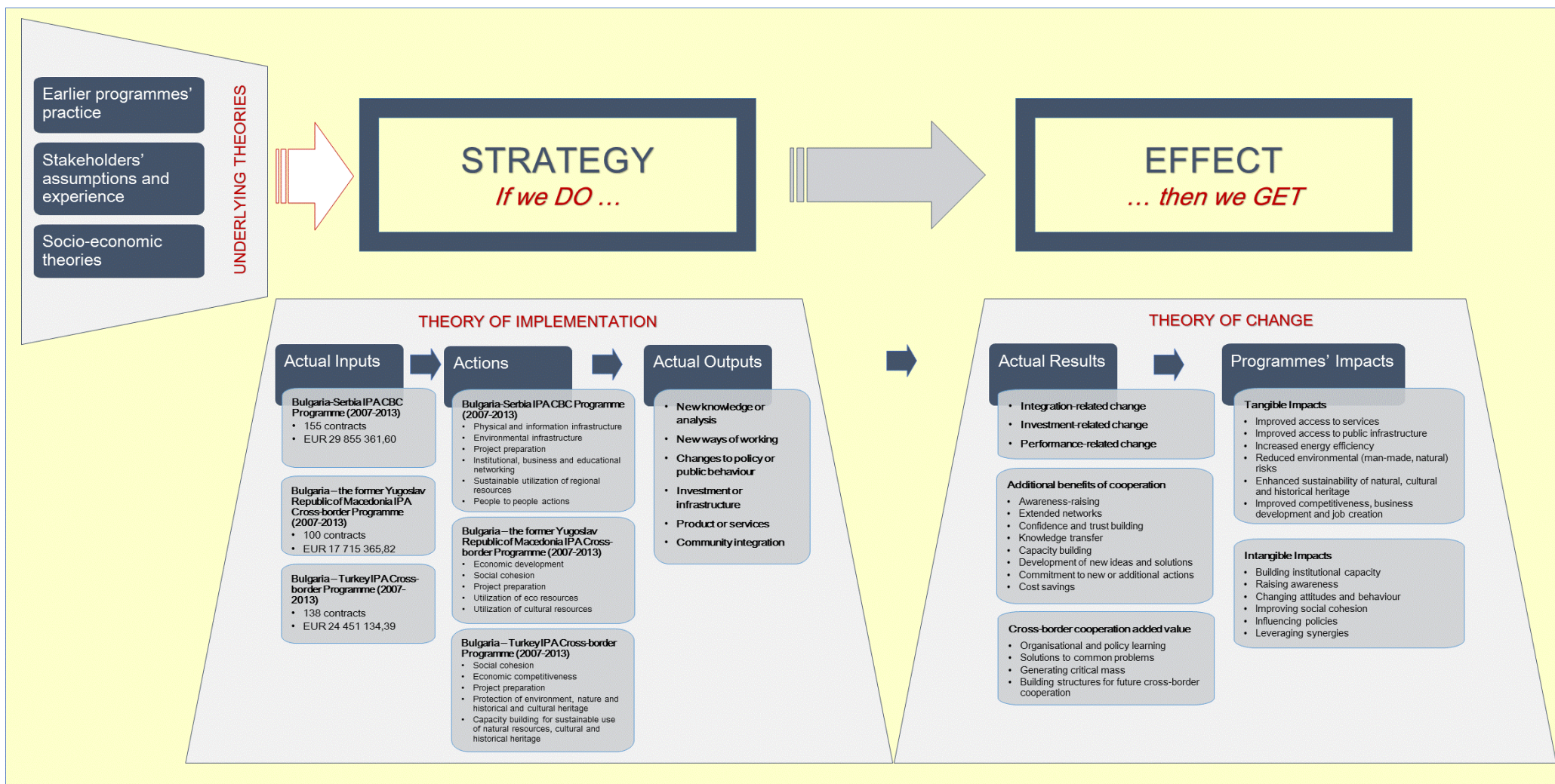


<p>Main project achievements (refers to the most significant and immediate result of a project's intervention)</p>	<ul style="list-style-type: none"> • New knowledge or analysis • New ways of working • Changes to policy or public behaviour • Investment or infrastructure • Product or services • Community integration
<p>Benefits of cooperation (defined as additional positive effects from working together in project partnership)</p>	<ul style="list-style-type: none"> • Awareness-raising • Extended networks • Confidence and trust building • Knowledge transfer • Capacity building • Development of new ideas and solutions • Commitment to new or additional actions • Cost savings
<p>Geographical impact (refers to area influenced by the respective cooperation projects and their achievements)</p>	<ul style="list-style-type: none"> • EU Level • Programme-wide level (i.e. both countries together) • Regional/District (national) level (i.e. each country separately) • Local / Municipality (national) (i.e. each country separately) • Partner level

Based on the above categorical data representing the most significant and immediate results of projects' intervention, their durability, transferability and geographic impact, as well as the evidence collected on main target groups benefitting from or using projects' achievements, and also such on nature and benefits of cooperation, a **reconstructed "theory of change"** for the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, has been elaborated. This was the main cornerstone for all evaluation activities carried out (documentary and projects' review, e-surveys and field visits) and a basis for presenting the respective evaluation findings.



Figure 3 Reconstructed “theory of change” for the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria



III. EVALUATION FINDINGS (answers to evaluation questions)

This section summarises the major evaluation findings and answers to respective evaluation questions. Each sub-section starts with a key evaluation question, provides relevant supporting information and includes an analysis of the issues treated in the evaluation question. The findings represent aggregated data for the three IPA CBC Programmes (2007-2013) altogether, while a comparative review of the findings for each of the examined Programmes is presented in Annex 1 herein.

3.1 Effects of cross-border cooperation

Did the IPA CBC Programmes (2007-2013) generate outputs, results and impacts that influence the cross-border cooperation?

- What is the level of achievement of the initially set Programmes' targets (by priority axes and spheres of intervention) and what is the evidence for these achievements?
- To what extent have the Programmes achieved the intended results and outputs?
- Which were the most preferable thematic fields of cooperation under the Programmes?
- What factors have influenced the achievement of outcomes, positively or negatively?
- To what extent can observed changes be attributed to the programmes' interventions and which were the factors/mechanisms which facilitated the attainment of long-term impacts?
- Are there unintended impacts and how they affected the overall impact?

Before explaining the concrete evaluation findings as regards overall Programmes' achievements, it should be noted that **a stable tendency of increasing stakeholders' interest towards cross-border initiatives has been examined** during the research. This is evident not only in terms of projects financed, but also by the project partners' and general public's attitude expressed within the surveys and interviews carried out. More than 95% of the respondents participating in the e-surveys are notifying that IPA cross-border cooperation is important for them and/or their organizations, and some 85-90% confirmed they were more actively involved and/or interested in cross-border cooperation initiatives during the 2007-2013 period, as compared to the previous programming period.

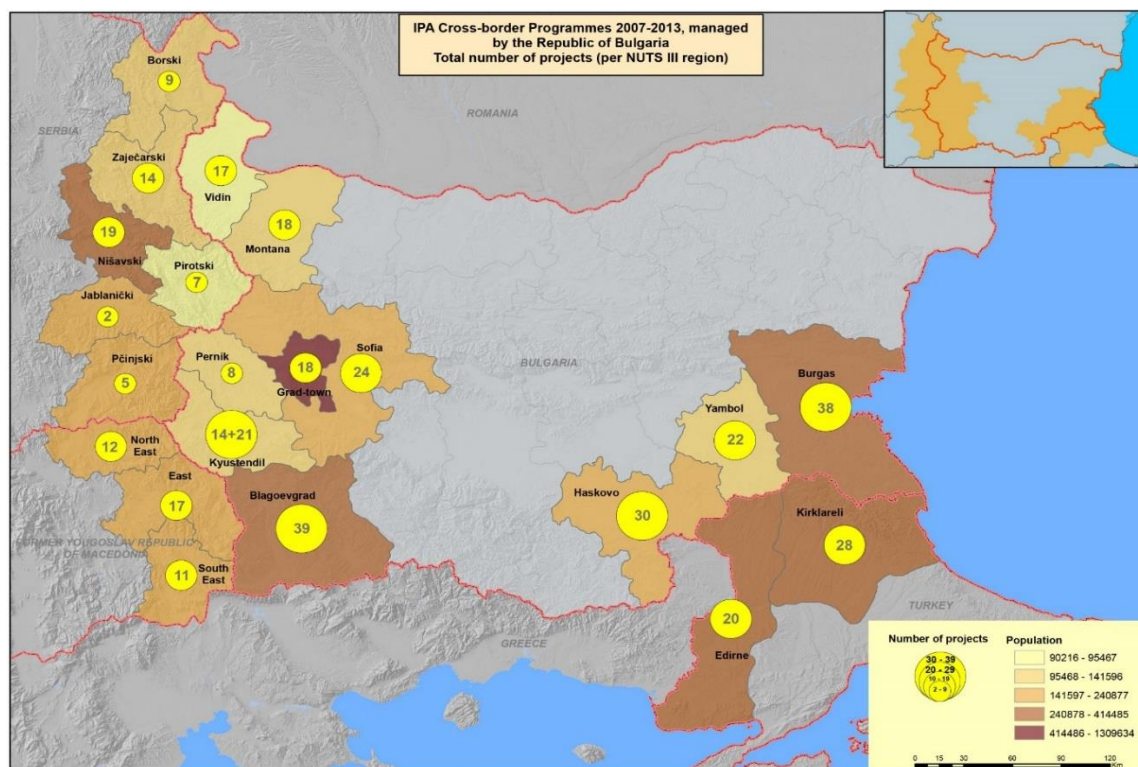
Figure 4 Which of the below factors influence your choice to apply for funding under the IPA CBC Programme/s (2007-2013)? (E-survey among project partners)

Answer	Response rate (%)
The CBC Programme fits to the scope and objective of our project idea/s	51.6%
The CBC Programme was the most favourable for us in terms of general requirements for funding (scope, size of funding, administrative regulations, etc.)	27.7%
The CBC Programme was a continuation of a PHARE/CARDS cooperation programme	12.2%
The CBC Programme was just another funding option for us – i.e. we have tried to propose our project ideas via any possible funding programme in the region/country	5.9%
Other (e.g. programmes are open to innovative projects; recognise RDAs as eligible applicants and is the only CBC programme where RDAs could have applied; provides opportunities for exchange of experiences and best practices in dealing with common problems, enhancing CSOs and widening the area of their activities, etc.)	2.7%

Overall, **393 joint projects have been financed** within the IPA CBC Programmes 2007-2013, managed by the Republic of Bulgaria. The territorial distribution of projects is more or less balanced and comparable with the level of regional demographic and socio-economic development factors; but also seems to be much dependent on stakeholders' capacity to participate and implement joint cooperation projects. The average number of projects financed per NUTS III region is 18.



Figure 5 Total number of projects (per NUTS III regions)



- **Note 1:** For the needs of this analysis, and due to the “joint” nature of projects financed, the total number of projects per NUTS III region is based on Lead Partners’ registration.
- **Note 2:** The Kyustendil district (Bulgaria) is eligible under two of the Programmes in subject, therefore the data presented illustrate both the resp. Programme’s and territorial aggregated figures.

In terms of project's distribution across Programmes' priorities, the comparative analysis performed demonstrates a strong interrelation with the Programme's strategic approach applied. E.g. for two of the Programmes in subject (i.e. BG-MK and BG-TR), the priorities set out were **thematically oriented** (e.g. covering both investment and soft measures in different spheres of intervention), which led to a relatively balanced distribution of both projects and budgets. Different approach was applied in the third programme (BG-RS), where **typologically formulated** priorities were set out (i.e. PA-1 addressing investment measures, while PA-2 – soft measures only).

Table 3 Input data per IPA CBC Programme 2007-2013, managed by the Republic of Bulgaria

Programme	Priorities (axes)	Projects (number)	Budget (verified amounts)
BULGARIA-SERBIA IPA CBC PROGRAMME (2007-2013)	• PA-1 “Development of small-scale infrastructure”	40	EUR 18 527 438.97
	• PA-2 “Enhancing capacity for joint planning, problem solving and development”	115	EUR 11 327 922.63
BULGARIA – THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA IPA CROSS-BORDER PROGRAMME (2007-2013)	• PA-1 “Economic Development and Social Cohesion”	54	EUR 8 158 297.20
	• PA-2 “Improvement the quality of life”	46	EUR 9 557 068.62
BULGARIA – TURKEY IPA CROSS-BORDER PROGRAMME (2007-2013)	• PA-1 “Sustainable social & economic development”	81	EUR 12 053 851.06
	• PA-2 “Improvement the quality of life”	57	EUR 12 397 283.33

However, despite the different strategic approach applied, all three IPA CBC Programmes 2007-2013, managed by the Republic of Bulgaria, have achieved positive outcomes, which clearly shows that the dynamics of the bilateral collaboration led to intensity of cooperation among local stakeholders and to an increased interest in implementing common cross-border initiatives for



sustainable development of the bordering regions. The **major achievements encompass**:

- ❖ **Increased governance capacity and improved policies** through development of joint strategic documents and exchange of best practices and know-how (22 projects in total).
- ❖ **Improved physical and information infrastructure** addressing the social and economic development in the regions through the implemented infrastructural projects for rehabilitation/construction of information, social infrastructure and business, and innovation facilities (71 projects in total).
- ❖ **Better preserved natural resources and biodiversity** as a result of permanent networks for environment protection and reasonable utilisation of natural resources, as well as **improved/developed early warning and risk management systems** as a result of partnerships for cases of natural man-made disasters created (67 projects in total).
- ❖ **Strengthened potential for tourism development** through sustainable utilisation of regional resources (natural and cultural assets) as well as exchange and transfer of know-how (107 projects in total).
- ❖ **Enhanced sustainable economic development of the border region and increased competitiveness of small and medium enterprises (SMEs)** by establishing joint information services and encouraging contacts across the border (59 projects in total).
- ❖ **Improved social cohesion** through establishment of new partnerships and networks promoting social and cultural inclusion across borders, as well as supporting investments in public health and social services (102 projects in total).

Beyond the above described achievements at project level, the Programmes also **contributed to wider effects**, notably in terms of alleviating specific barriers to cooperation (mainly cultural and distance barriers), and of better social integration. One of the key results of the IPA CBC Programmes 2007-2013, managed by the Republic of Bulgaria, was indeed their contribution to enhanced cooperation among a wide range of stakeholders. A significant number of organisations have collaborated and worked together, which would not have been possible without the IPA CBC programmes. They have also **encouraged considerable learning and knowledge transfer between stakeholders to enhance “capacity building”**.

However, as the IPA CBC Programmes 2007-2013, managed by the Republic of Bulgaria, were meant to operate in a wide ranging priority areas (following the resp. EC guidelines and regulations), they covered a variety of sectors and remained **broad, without clear prioritization and without being firmly results-oriented**. The lack of hard evidence on what the Programmes deliver in terms of results and what benefits they bring to the communities they serve is recognised as a major weakness. This, however, is a weakness identified for most of the ETC programmes during the 2007-2013 period, and thus could be considered a system failure (i.e. ex-post evaluation of Interreg III concluded that, while programmes delivered on a wide number and range of outputs, it was difficult to establish the effect of these and the particular value added by cooperation).

Even though Programmes' indicators measurement has been improved in time, they still remain largely deficient (i.e. rarely followed the SMART principles) and were not properly calculated. The result indicators are felt to be inadequate, in some cases inappropriate (including also indicators suitable to measure outputs rather than results) and do not provide a sufficient basis for monitoring or measurement. The main deficiencies relates to the missing link between definition and measurement unit which does not allow measuring properly the achievements of the funded interventions in terms of conducted change. Therefore, **substantial revision of the achieved values for both output and result indicators' values** has been proposed in the frame of the 100% projects' review made by the Evaluation Team.

Given the above, the present evaluation analysis was based primarily on a qualitative approach and findings, while main Programmes' outputs and results achieved are presented in a schematic way (which, in fact, is an alternative way of presenting evaluation data). The level of achievements of Programmes' results is expressed as weighted average value incorporating the respective Programmes' outputs achieved. Fig. 6 below represents aggregated average values for the three Programmes altogether, while a comparative analysis by Programme is further presented in Annex 1 to this report.



Figure 6 Programmes' outputs and results – level of achievement

Level of achievement		Programmes' results	Programmes' outputs	Level of achievement	
Weighted average (1-lowest; 5-highest)				Weighted average (1-lowest; 5-highest)	
2.92		PERFORMANCE-RELATED CHANGE	Investment or infrastructure		3.47
2.91		INVESTMENT-RELATED CHANGE	New knowledge or analysis		3.03
2.67		INTEGRATION-RELATED CHANGE	New ways of working		2.98
			Changes to policy or public behaviour		2.98
			Community integration		2.89
			Product or services		2.84

On comparative basis, all three types of **intended changes (results)** within the Programmes have been achieved and almost evenly valued in terms of their positive impacts. Despite of the fact that most of the investment measures have been rather “mirror” (i.e. similar or complementary activities done separately at each side of the border) than “joint”, the majority of them did tackle common needs and enhanced cooperation. The transfer of experience, being in most cases combination of soft integration-related or performance-related changes achieved, built on the visible results from the investments thus bringing further positive impacts and contribution to the major aim of the cross-border cooperation programmes.

It is obvious that the IPA CBC Programmes 2007-2013, managed by the Republic of Bulgaria, have **generated outputs and results that have moderately influenced the cross-border cooperation** in the Programmes' area. However, one of the major impediments to achieving substantial and visible long-term impacts is that **IPA CBC Programmes (2007-2013) are small in terms of relative budget size**. Overall, the budget absorbed by the three IPA CBC Programmes altogether was EUR 87.9 million (excluding funds under “technical assistances” axes), with an average rate of funds allocated per NUTS III region of EUR 2.3 million. The rate of costs verification is about 82%, which is relatively high given the fact that at the time of preparing the present report there were still few projects under implementation.

Figure 7 Budget structure – total verified amounts (per NUTS III regions)

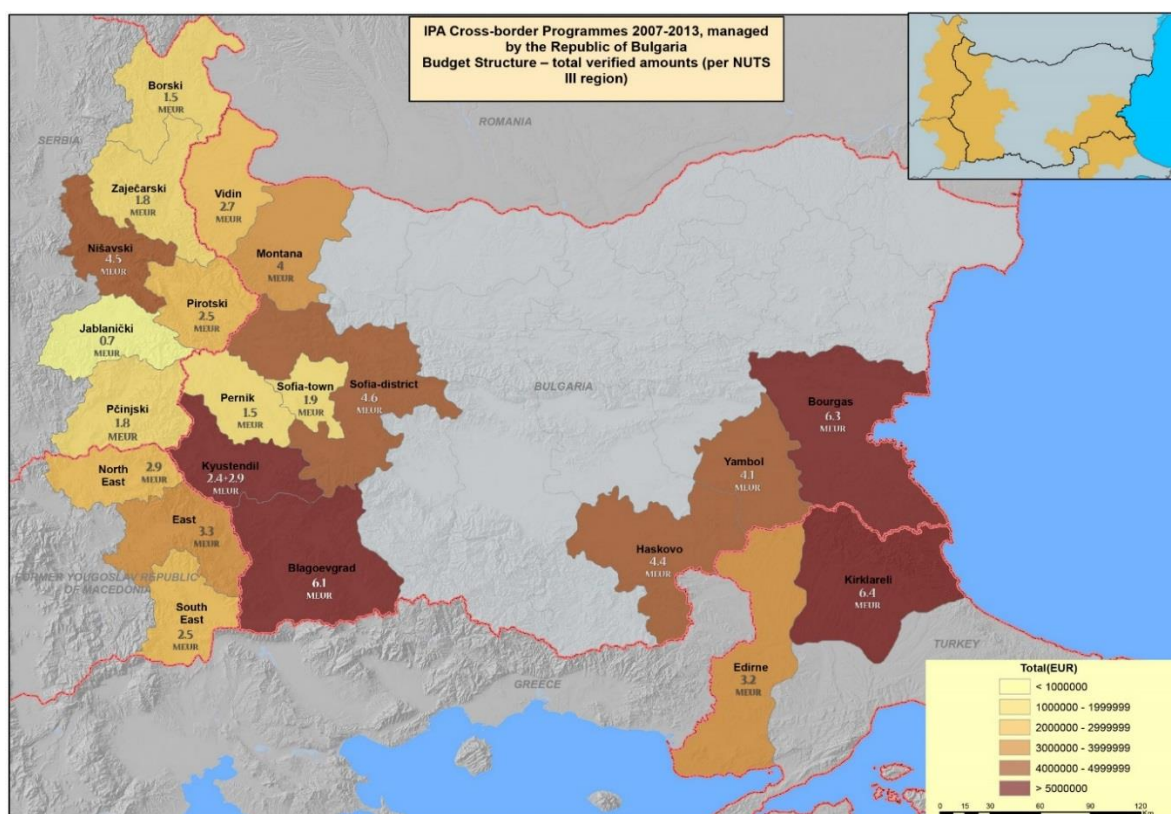
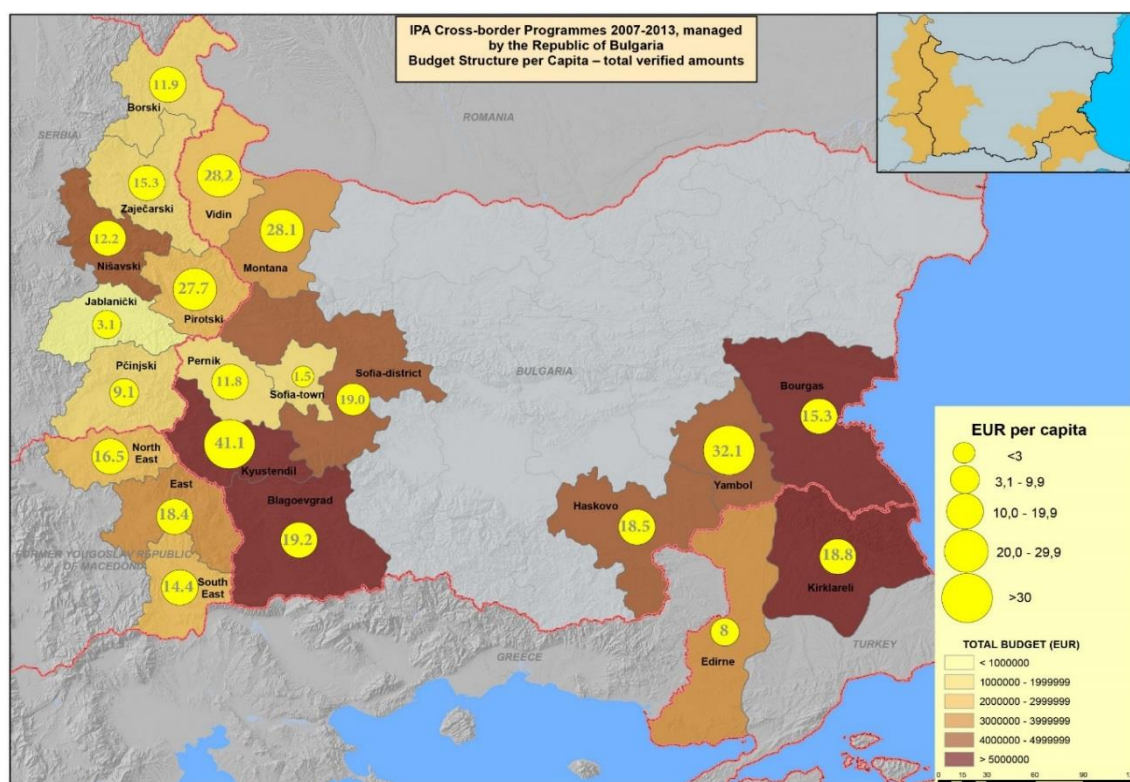


Figure 8 Budget structure – total verified amounts (per capita)



The map above clearly indicates that the average per capita allocations for the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, amounts to some EUR 12. If compared to ERDF/CF mainstream programmes budget allocation per inhabitant (e.g. EUR 884.0 in Bulgaria), it appears clearly that the amounts per capita devoted to IPA CBC initiatives remains marginal compared to those allocated through other European funds. Hence, the **impact of the programmes should be seen in the light of these budgets.**

It could be revealed that projects funded have created certain visible **tangible impacts** expressed in improved access to services and public infrastructure, as well as **intangible impacts** as regards awareness raising, improved social cohesion and enhanced capacity for joint planning, problem solving and development.

Figure 9 Tangible and intangible impacts obtained at project level

Tangible impacts	Level of achievement		Level of achievement		Intangible impacts
	Weighted average (1-lowest; 5- highest)		Weighted average (1-lowest; 5- highest)		
Improved access to public infrastructure	3.22		3.30		Raising awareness
Improved access to services	3.04		3.04		Improving social cohesion
Enhanced sustainability of natural, cultural and historical heritage	3.00		2.82		Building (institutional) capacity
Reduced environmental (man-made, natural) risks	2.98		2.70		Changing attitudes and behaviour
Improved competitiveness, business development and job creation	2.83		2.63		Leveraging synergies
Increased energy efficiency	2.81		2.52		Influencing policies

The **enhanced cooperation among stakeholders** is both evidenced from the case studies pointing towards improvements in the culture and quality of cooperation, but also via indicators computed by the Programmes revealing that a high number of initiatives are undertaken to set up networks, joint research, joint management systems, and cooperation activities. The last encompass both formal and informal networks, institutionalised links and more ad hoc connections. Such enhanced cooperation in turn led to the creation or consolidation of a regional identity in the sense of an increased acknowledgment by stakeholders in a certain area of the value of cooperating across borders and an improved social capital (including knowledge of the partners on the other side of the border and a better understanding of the potential for cooperation).



Box 1 Case Study: “Cross-border collaboration in development of CAD/CAM vocational training system” (2007CB16IPO008-2013-3-004 - CAD/CAM)

The **project CAD/CAM** has aimed to improve social cohesion and social links in the cross-border region in order to achieve competitive staff in the labour market through sustainable improvement of vocational training in both Bulgaria and Turkey. During the project implementation two schools worked together to improve the quality of technical education through implementation of modern CAD/CAM systems. Additionally, two fully equipped modern labs with computers, adequate software and innovative training methodology have been developed and jointly tested in real operating environment. In long term perspective the project has improved the competitiveness of students on the labour market and gave ground for prevention of unemployment in the cross-border region.

In order to boost the project’s sustainability, **a network of CAD/CAM society has been established**. It involves specialists in the field including teachers, students and business organizations that use CAD/CAM systems in their work. The common issues of this society, including new training methods and the most appropriate CAD/CAM systems for achieving success, have been discussed. This way the needs of companies in both Bulgaria and Turkey for specialists in CAD/CAM systems and new CAD/CAM solutions and applications have been identified.

Besides the emphasis on main projects’ achievement, the other focus of the evaluation research was on the benefits partners gain from participating in a cross-border cooperation project. ‘Benefits of cooperation’ were defined as **additional positive effects from working together in project partnerships**, besides those impacts related to the main project achievements. In other words, benefits of cooperation are intangible (but also tangible) impacts, or project results, benefitting the project partners. Since, in many cases project partners are the primary target group of the project achievements, these can also be considered a benefit of cooperation.

Figure 10 Additional benefits of cooperation for project partners (E-survey among project partners)

Benefits of cooperation	Level of achievement	
	Weighted average (1-lowest; 5- highest)	
Confidence and trust building		4.55
Awareness-raising		4.52
Extended networks		4.51
Knowledge transfer		4.48
Development of new ideas and solutions		4.46
Capacity building		4.40
Commitment to new or additional actions		4.36
Cost savings		3.70









As seen from Fig. 10 above, eight types of benefits were defined. Most important benefits were ‘confidence and trust building’, ‘awareness raising’, ‘extended networks’, ‘knowledge transfer’ and ‘development of new ideas and solutions’. Rated rather lower were benefits arising from the ‘commitment to new or additional actions’, and ‘cost savings’. When comparing the importance of cooperation for the achievement of the various project outputs and results, it was noticed that investments require the least degree of cooperation, while at the other end of the scale - the development of a new product or service depends most on the cooperation of the partners.

Among the **most preferable thematic fields**⁵ of cooperation under the IPA CBC Programmes 2007-2013, managed by the Republic of Bulgaria, were **Tourism and Cultural Heritage (27%)**, **Environment (17%)**, **Competitiveness (15%)** and **Youth and Education (15%)**, calculated by number of projects implemented. The above distribution is further reflected in the Programmes’ budget structure (see Fig. 11 below).

⁵ The analysis is based in accordance with the eight “thematic priorities” as set out in Annex III of the IPA II Regulation (EU) 231/2014 for assistance under cross-border cooperation programmes. It should also be noted that there is no such formal “thematic field” identification within the projects financed during the 2007-2013 programming period. Therefore, the aggregated data shown in this report represent a subjective judgment of the Evaluation Team made during the projects’ review carried out.



Figure 11 Most preferable thematic fields of cooperation during the 2007-2013 programming period

Thematic Field of Intervention	Projects (number)	(%)		Funds absorbed (EUR)	(%)
Tourism and cultural heritage	107	27%		EUR 18 722 880.92	26%
Environmental protection, climate change and risk prevention	67	17%		EUR 10 264 419.36	14%
Competitiveness, business and SME development, trade and investment	59	15%		EUR 11 017 259.77	16%
Youth and Education	58	15%		EUR 9 218 280.41	13%
Employment, labour mobility and social inclusion	44	11%		EUR 5 680 421.60	8%
Transport and public infrastructures	25	6%		EUR 7 383 920.01	10%
Local and regional governance, planning and administration capacity building	22	6%		EUR 5 377 668.97	8%
Research, technological development and innovation and ICT	11	3%		EUR 3 382 595.60	5%

Activities related to **employment, health and social inclusion** also attracted some interest, which further balanced the Programmes' thematic orientation. On a contrary, **research, technological development and innovations** seem to be a thematic field difficult for cooperation as stakeholders' capacities are rather limited, though ICTs as an instrument have been widely used in projects (e.g. web-platforms, on-line databases, GIS databases, on-line learning tools, etc.).

Overall, it could be concluded that the **scale of results achieved was often small and the leverage effects on the economy or on the social well-being of the population as a whole were rather limited**. However, **achieving a wider (territorial) impact might be too ambitious objective given the limited budgets devoted to the IPA CBC programmes**.

3.2 Durability of cooperation

Are the positive effects likely to last after IPA CBC Programmes (2007-2013) have been completed?

- What learning (good practices) has been generated? Who has benefited from that learning? From which stakeholders to which other stakeholders has knowledge and capacity been transferred?
- Were the projects outputs available to the selected target groups and to the people in the region after the projects' completion? Are the Programmes' outputs and results assessed as sustainable on long term basis?
- What is the likely future for such learning mechanisms and co-operation? Will its sustainability depend on future EU financing?

The IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, likewise most of the EU-funded programmes, are seeking to find new and more innovative ways of dealing with problems and needs. However, besides new methods, new knowledge and new services, evaluators are usually trying to identify some new approaches in combating the local problematics, that is furthermore noticed and appreciated by the general public as well. Unfortunately, such cases are rarely found in the 2007-2013 programming period; generally said, what have been done by the Programmes (e.g. the projects financed) was made by **applying "standardised" methods and solutions to problems rather than searching for more innovative, widely-attractive and completely new practices and approaches**.

However, it should be taken into account that a significant number of the programmes' beneficiaries were small municipalities or organisations coming from small or distant localities with not so easy access to novelties. To many of them to deal with completely new ways of working with international partners, requiring new knowledge to be acquired in order to create new products and services was a challenge not easy to take.

Most of the projects have been initiated and realised by local authorities, NGOs and educational institutions and these same groups have benefited from project results, transferring the benefits also to local SMEs and general public (individuals) – i.e. young people, entrepreneurs, unemployed, students, teachers, etc. They have been involved as direct beneficiaries in many of the



funded actions thus receiving immediate benefits, making in this sense the projects intangible results more sustainable. In this sense, it could be concluded that **the basic learning resulting from the Programmes was the knowledge and experience shared.**

Despite the formal status of the various project partners participating the programmes' implementation, most of the projects were aimed at improving certain services and/or policies, which indirectly reflect the work of the local authorities, and hence, resulted in improving the benefits for the general public and local residents in the border areas (being the final beneficiaries of such services and/or policies). Undoubtedly, the infrastructure built and/or renovated will be available after the Programmes are formally closed and will be used for the same purpose. The new partnerships and contacts built also have the potential to be used in the future. The exchange of experiences stimulated will further influence the work of the participating organizations.

Box 2 Case Study: "Establishment and development of social infrastructure" (2007CB16IPO006-2009-1-105 - EDOS)

"EDOS" project demonstrates how the combined efforts of two border municipalities from Bulgaria and Serbia lead to establishment of a **common approach to providing modern social care services** in the region. The project extends its direct cross-border effect as it does put forward a joint solution to a general setback which the municipal administrations are nowadays facing – i.e. the lack of adequate social infrastructure for the needs of the elderly citizens.

The two **Elderly Care Centres** established prevent social exclusion and promote the integration of individuals and families that need social support or assistance due to economic or personal difficulties, disability or other reasons. Additionally, the research and thematic events included in the project were meant to hammer out solutions allowing economically disadvantaged families with members having disabilities to obtain easier access to social services.

At present, both municipalities are contemplating on the possible upgrade of project's outcomes with the implementation of various day-care activities within the centres, some of which will further include **volunteering services of young people**.

The prospect of learning mechanisms and co-operation developed through the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, being sustained in the future is dependent upon a combination of factors:

- ❖ **The sustainability of learning and co-operation is likely to be determined by the level of trust and confidence between partners.** The co-operative nature of the Programmes is an intrinsic driver for enabling different partners to work together on a cross-border basis as to arrive at joint solutions for common problems. For some partners, the development of collaborative partnership relationships through the Programmes is considered as an important basis for sustaining and further developing learning mechanisms beyond the confines of the current cross-border cooperation programmes.
- ❖ **The likely future of learning mechanisms and cross-border cooperation is also linked to the motives and interest towards infrastructural and institutional cooperation realized through the Programmes.** The long-term sustainability of cross-border infrastructure depends on continued supportive national/regional/local governments' policies. The impacts of the supported investments in tourist, educational, environmental and economic infrastructure could be generally considered as largely sustainable. In the medium to long term perspective this sustainability, however, would depend on the commitment and abilities of the respective bodies to ensure budget provisions for continuous maintenance. Such challenge would appear especially for the smaller and more deprived localities. To a large extent this would also depend on future economic development, and on whether (or not) severe budget constraints do not occur. Self-sustaining of the built infrastructure alone without public subsidies is not possible.
- ❖ As regards **institutional cooperation structures created, these could be considered as generally sustainable**, but regional and local structures established are at risk. The capacity of local and regional offices to maintain, further develop and promote the newly created structures is quite low (limited staff and resources to cover travel and overheads) and they often lose interest or are forced to move to the next operation and focus on a new project.
- ❖ As regards the **sustainability of projects' outputs created by civil society structures, it is dependable on continued efforts of the NGOs themselves again in respect to limited resources and scarce budgets, but also on the stable policy environment.** In general, the sustainability of 'soft' projects is difficult to be assessed as it depends on the ability of local societies, NGOs and their partners across the border to maintain funding. Such structures were often fragile, established for a particular, project-specific purpose and very much depended on



personal relationships. Very often the activities of local initiatives and NGOs depend on continuous support and project partnerships provided by local or regional authorities. Sustainability of projects addressing 'people-to-people' and 'business-to-business' relations are dependent on continued efforts and stable policy on both sides of the border.

In conclusion, **many of the cross-border cooperation projects would not have been possible without the existence of IPA CBC Programmes, which remains a unique instrument to support joint initiatives across borders**. In this regard, financial resources provided represent the most prominent example of EU added-value, however requiring in the meantime a long term commitment for ensuring sustainability of results. The evaluation has shown that good cases of sustainability of IPA CBC project's results exist, mainly when tangible results from the projects are adopted in practice and when public authorities take ownership of them; while also private sector shows a clear interest.

3.3 Added value of cooperation

Were the IPA CBC Programmes (2007-2013) additional to what would otherwise have taken place in the region?

- To what extent have the Programmes succeeded to strengthen the regional integration and territorial cohesion across borders?
- To what extent has co-operation been enhanced? What barriers to co-operation have been removed? What is the evidence for the contribution of IPA CBC Programmes?
- To what extent did the Programmes bring added value as regards: a) "organisational and policy learning"; b) "building structures for future cross-border cooperation"; c) "critical mass" and d) "finding solutions to common problems"?
- What is the comparative effectiveness and added value of the Programmes to the development of the peripheral cross-border regions confronting identical challenges?

Based on the evaluation results, it could be revealed that the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, have **contributed to some of the main EU policies, namely: regional development and integration with a key accent being strengthening the partnerships across the border**.

Figure 12 To what extent has the project bring benefits for strengthening the regional integration and territorial cohesion across borders? (100% project's review checklist)

Areas of operation	Weighted average (1-lowest; 5- highest)
REGIONAL DEVELOPMENT (i.e. reduction of differences in social and economic development of regions)	3.23
PARTNERSHIP (i.e. creation of stable structures and co-operation habits by encouraging the networking across the borders)	3.21
PERIPHERALITY (i.e. decrease the disparities between border areas and the rest of the country)	3.12
INTEGRATION (i.e. reduction of barriers in social and cultural integration on both sides of the border)	3.07
COMMON MARKET (i.e. reduction of barriers in business operations and free flow of employees and goods)	3.02
ECOSYSTEMS (i.e. reduction of barriers in coherent management of ecosystems divided by national borders, incl. security systems concerning ecological and natural disasters)	3.00
FLOW CAPACITY (i.e. increase trans-border passenger and cargo traffic)	2.72

Overall, the **Programmes have brought benefits for strengthening the regional integration and territorial cohesion across the borders to a moderate degree**; areas like common market and flow capacity got even less attention (by the projects funded).



The fact that projects predominantly focused on tourism and environment, issues like access to isolated settlements, depopulation, etc. were almost not touched by projects' interventions. In any case, the largest impact observed was on strengthening partnership and building new linkages between the organisations, SMEs and individuals from both sides of the border. It should also be emphasised that for some less developed areas, these Programmes are actually one of the key instruments to tackle regional disparities, peripherally, as well as for sustaining the local natural and cultural heritage.

The cooperation in the Programmes' areas substantially enhanced with the help of the cross-border cooperation initiatives funded, and the effects are visible – namely, through increased cross-border movement of people and exchange of goods and services in the region, tourism and cultural events held and partnerships created. In total, more than 16 000 participants were involved in joint projects' activities and events, incl. training courses/trainings; some 1 700 SMEs participated in information events, B2B meetings, trainings and other project activities; and more than 1 400 institutions/ bodies participated in actions.

The analysis of a sample of projects and questionnaire responses proved that the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, **added value to the development of the border area**. Project beneficiaries recognise the Programmes as the right tool for funding joint solutions to common problems and they choose to implement projects under these concrete programmes, even if alternative sources of finances were available.

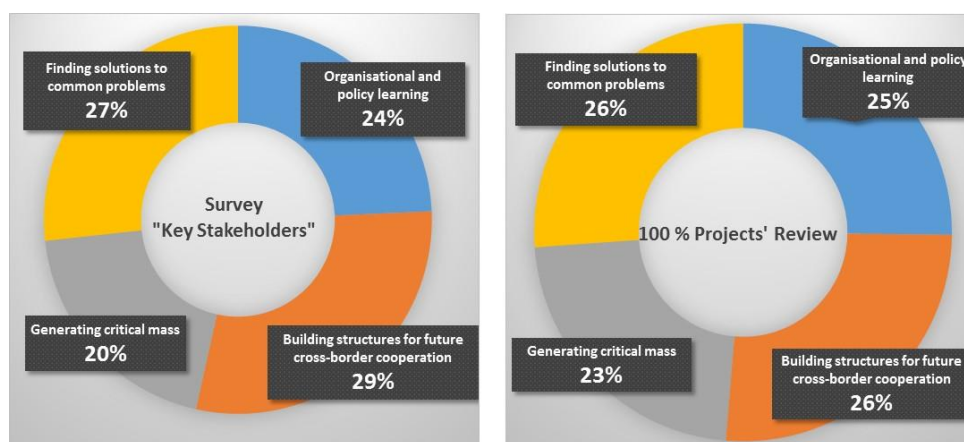


Figure 13 Added value of cooperation

Following the 100% project review done by the evaluation team, from the 4 pre-determined added value categories the greatest emphasis was given to 3 of them: e.g. “building structures for future cross-border cooperation”, “finding solutions to common problems”, and

“organisational and policy learning” (and this mostly in projects dealt with of tourism, cultural heritage and environment protection). Still the need to have “critical mass” ensured on activities and outcomes is not so much understood (both by Programme’s management structures and beneficiaries), and respectively targeted in the funded projects.

At present the border areas in Europe are more and more subject to territorial cooperation, which creates appropriate conditions for functional cooperation between adjacent territorial units aiming at solving problems of common interest, but also in transferring best practices for that. A distinctive feature resulted from the European integration processes, leading to the free movement of services, capital and labour is the creation of two significantly different types of borders, namely *internal* – between EU member states, and *external* – between EU member states and non-member states. E.g. the accession to the EU of the new member states (e.g. as is the case of Bulgaria and Romania) has brought about important changes in their trans-border cooperation, particularly in the internal borderland areas: formal legal arrangements have been established and the shaping of connections between the actors of cooperation in these border areas – regional and local governments, local communities, education, cultural and scientific institutions, NGOs, etc. – has gained a considerable importance.

In a broader perspective, future cross-border cooperation at external borders has to also take into consideration regional and local identities as an important element for the economic and social development, turning to good account the potential of the whole partnering area. Where the basic conditions for cross-border cooperation are already in place, **the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, should focus assistance on actions that bring visible cross-border added value**, for example increasing cross-border competitiveness through innovation, research and development; connecting intangible networks (services) or physical networks (transport) to strengthen cross-border identity; promotion of cross-border labour market integration; and cross-border water management and flood control.

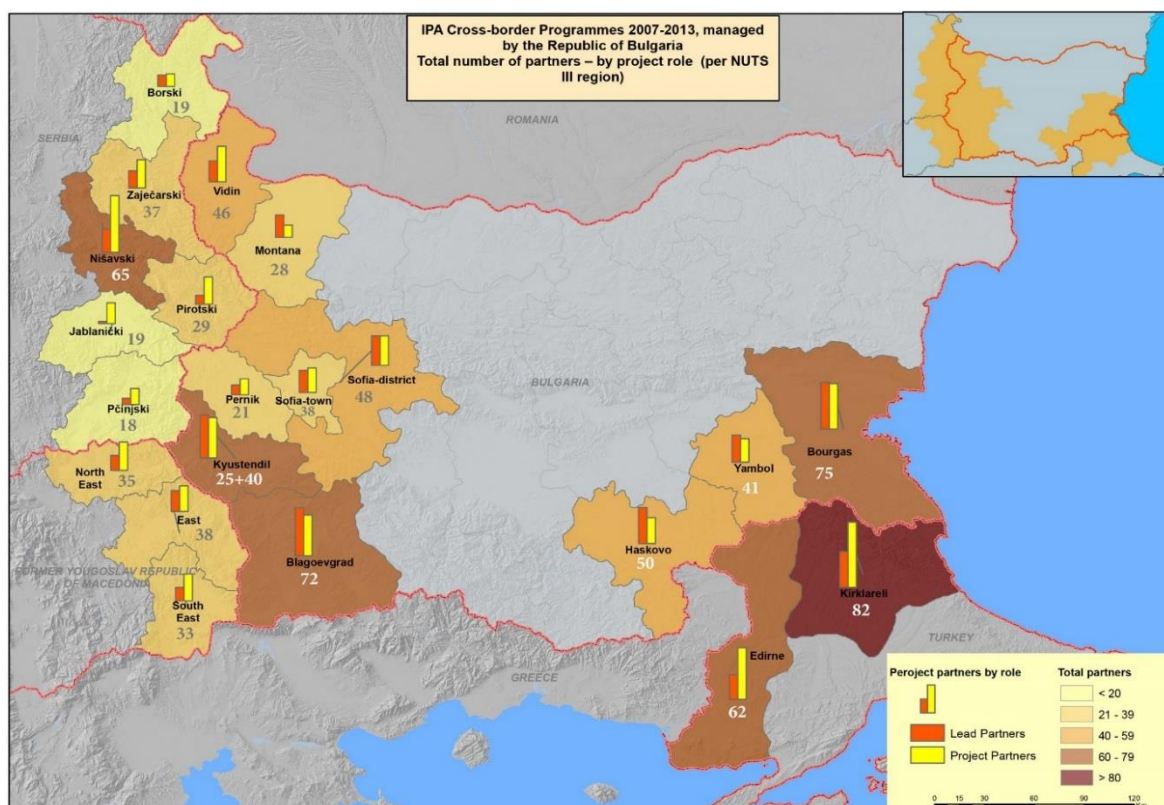
3.4 Utility

Do the IPA CBC Programmes (2007-2013) have an impact on the target groups or populations in relation to their needs?

- Which were the project partners and main target groups involved and/or interested in the projects implementation, and who has benefitted from the achieved projects results?
- To what extent did the activeness vary by type of beneficiary (e.g. municipality, NGO, educational institution), and in which regions were the majority of the involved stakeholders?
- What are the key motivators for participation in IPA CBC funded initiatives? What are the key de-motivators to participate in IPA CBC funded initiatives?
- Which were the specific constraints affecting the active involvement of certain types of beneficiaries / partnerships in development and implementation of project ideas?
- What change can be observed in the cross-border area and for the people living there in relation to the Programmes' objectives achievement?

The **total number of partners**, participating in projects funded by the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, **was 635⁶** (out of which 335 from Bulgaria, 126 – from Serbia, 80 – from the former Yugoslav Republic of Macedonia, and 94 – from Turkey). The lead role, naturally, was often taken by the Bulgarian partners – e.g. 63% of all successfully completed projects had Bulgarian Lead Partners (LP).

Figure 14 Total number of partners – by partner's role in a project (per NUTS III region)



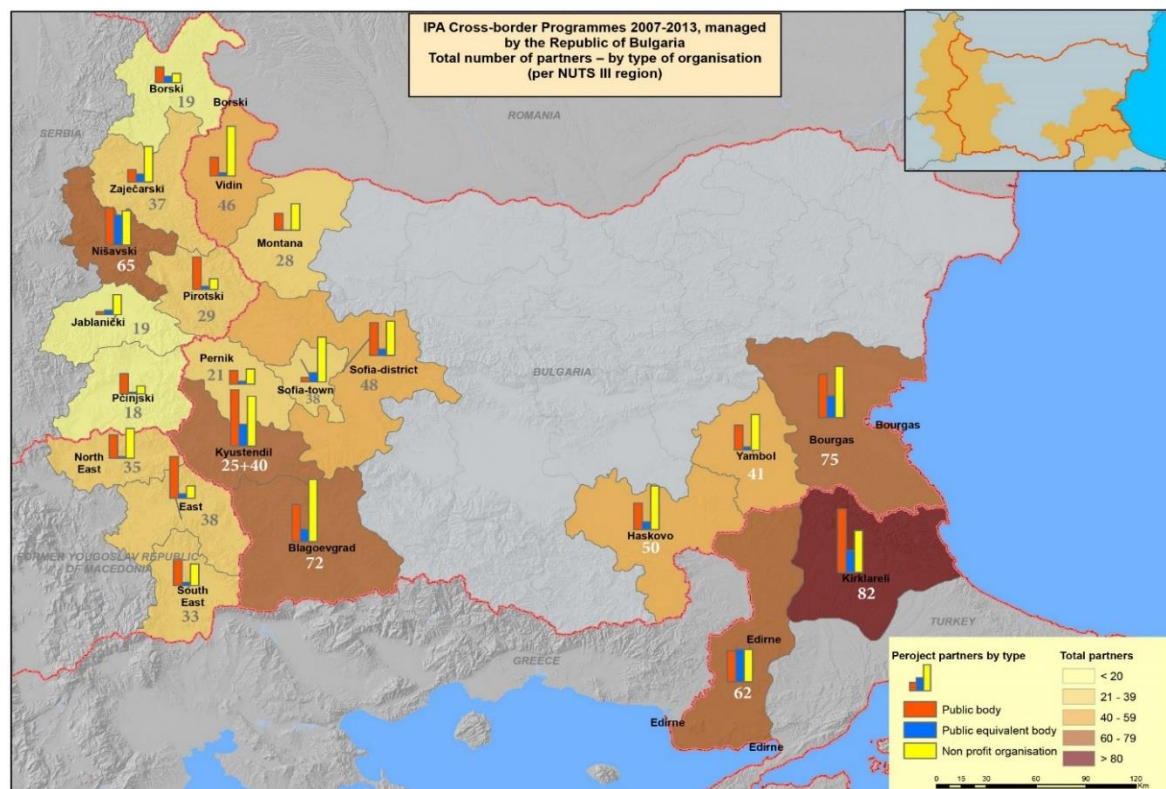
As regards **partners' representation per type of organisation**, the non-profit making organisation are taking the lead with some 46%, followed by public entities (40%) and public-equivalent ones (13%). It should be noted that the above classification is done

⁶ The absolute number of partners was 921, but many of them took part in more than one project funded by the Programmes.



following the pre-determined “type of organisations” at Programme level; in this regards, it would be recommendable the classification to be more precisely determined for the next programming period (2014-2020), thus giving ground for better analytical evaluation findings.

Figure 15 Total number of partner – by type of organisation (per NUTS III region)



The local authorities were the most usual target group and/or beneficiary of the projects implemented along with the economic operators, NGOs and the general population.

Figure 16 Target groups, direct and final beneficiaries (addressed by the programmes)

Target group, direct and final beneficiaries	Share (%)
General public (inhabitants)	19%
Local authorities (municipalities)	18%
Civil society structures (NGOs)	12%
Economic operators (SMEs)	11%
Education and training institutions	9%
Business-support structures	6%
Youth organisations	5%
Cultural institutes	5%
Regional offices of central administration	3%
Universities and science institutions	3%

Being bodies responsible for the development and implementation of local policies, naturally, municipal administrations were contacted by various organizations in different sectors for operating joint activities. Another very active group of beneficiaries were the educational and training institutions being involved in both investment and soft measures. Local residents, incl. students, young people, unemployed, have also largely been involved directly as target groups in actions and on a wider scale as final beneficiaries, since most of the projects’ activities were aimed at improving the quality of life of the targeted territories.

NGOs and public sector organisations were equally active in project promotion and implementation. The most usual partnership was between two public bodies (municipalities, educational or cultural institutions) and between two NGOs, due to the fact that



they are sharing similar needs, interests and competences.

Figure 17 Which of the statements are valid for your decision to enter into a concrete partnership structure for implementing your project idea/s? (E-survey among project partners)

Factors influencing the decision to enter into a partnership	Answers received (%)
We had long-term relations with our partner/s, prior deciding to apply with the concrete project/s	33.3%
We were looking for "similar" partner(s) – as type of organization, capacity and expertise	20.4%
It was jointly decided by the partners taking into consideration the needs and capabilities of all of them	18.8%
We were looking for a "complementary" partner(s) – as type of organization, capacity and expertise	10.8%
We searched for our partner/s intentionally for the purpose of applying with the project idea/s	9.7%
We were looking for a "distinctive" partner(s) – as type of organization, capacity and expertise	3.8%
The partnership structure was decided by the Lead Partner	2.7%
Other	0.5%

It should also be noted that government agencies represented in the border regions (e.g. district/regional administrations, regional agencies of central administrations, etc.), as well as any joint border structures and institutions, have been scarcely involved and did not directly benefited much from the Programmes. To this view, it is to hope that the participation of such beneficiaries will be further increased in the next programming period as they have the potential to increase the territorial impact of Programmes' results.

Box 3 Case Study: "Joint information system for process optimization "One Health" in the CBC area" (2007CB16IPO006-2011-2-250 JIS "One Health")

JIS "One Health" is a model cross-border project improving the transboundary control of diseases of animal origin and preservation of animal and human health as a crucial condition for regional economic development. The project idea was promoted by the "Bulgarian Food Safety Agency - Pernik", which together with 3 other regional agencies decided to establish a joint information system as an instrument for improvement the quality of the control mechanisms of respective veterinary authorities, which would raise the level of readiness for quick and proper response and joint measures.

In addition, it was agreed to increase the range of control activities through improved laboratory conditions for control and observation of the situation in the border region regarding zoonosis, as well as to increase the acquaintance of veterinarians, physicians, farmers, and other stakeholders regarding EU policies and recommendations on JIS "One Health" utilisation. Hence, the project has contributed to the implementation of EU policy for Animal Health (2007-2013), as well as reduced the economic losses for farmers and the state compensation payments through strengthening the effectiveness of control over the spread of animal's disease, as well as diminished the danger for human health from diseases spread by animals.

Box 4 Case Study: "Stara Planina - New Network (Knowledge base for planning, problem solving and development" (2007CB16IPO006-2011-2-008 - SMART START)

The **SMART START project** combines efforts of regional governance experts, education society and business as to enhance planning, problem-solving and development capacity, while also improving administrative, business and academic links between stakeholders in the border area. The target group includes 19 local administrations, regional development institutions as well as business and education sectors' organisations.

The project targeted the creation of a common virtual space - the "**Knowledge Database**", where the information as regards the development of the border area to be made available to all interested stakeholders. The informal network created enables the direct exchange of experience and initiate the process of cross-border knowledge transfer, and hence, allows for future cooperation between the institutions and experts in the area. An important "intangible" impact of the project are the forums and meetings carried out, as they gave aground for **exchange of information on EU regulations in view of the forthcoming accession of Republic of Serbia to European Union.**



As regards the **type of partnerships created**, the majority of the projects were implemented by 2-members partnerships (73.8%), another 20.9% of the projects were done by 3-members partnerships and 4.6% by 4 partners. It should be noticed, that during the 2007-2013 programming period even 5- and 6-members partnerships have been mobilised (within BG-RS programme), but this can't be considered as a tendency since these were just few projects having such a wide partnership structure. However, taking into consideration that cross-border cooperation projects are not easy for management and coordination, such a wide representation within single projects is to be considered substantial improvement of the Programmes' partnership structure as a whole. This also raise knowledge and skills on how to jointly work in large networking environment, which is a good pre-requisite for accumulating skills necessary for the organisations if they intend to further take part in wider trans-national and/or interregional partnerships.

Key motivating factors	Weighted average	
	(1-lowest; 5- highest)	
Exchange of experience with partners in other countries		4.85
Development of common solutions		4.66
Giving our organization an international profile		4.56
Extra funding for our organization's activities		4.54
The IPA CBC programmes address topics that are important for our organization		4.47
Building of professional networks		4.46
Other		2.69











Figure 18 What are the key motivators for participation in IPA CBC funded initiatives? (E-survey among general public)

The vast range of possible areas of action the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, were offering **motivation for participation** in

general, since participants have larger options to implement their ideas and build on their experience; unlike other (national) Operational Programmes that are much more restricted in the possible spheres of interventions and eligibility of applicants. In some cases (and for some applicants), the IPA CBC Programmes have been the only possible funding source for implementing their ideas.

The evaluation results obtained show a **steady trend towards establishment of long-term partnerships on both sides of the borders**, which is one of the objectives of the Programmes. In the e-surveys carried out among project partners and general public, none of them responded as being involved and/or that involves partners just because of the Programme's "joint" requirement. The results of these surveys have also demonstrated that the Programmes addressed various needs of the organizations, and thus strengthened their capacity. The 'exchange of experience' gain the highest percentage in terms of "motivation for participation", which is quite natural for international programmes. The analysis also demonstrates that other key motivators for participation in the IPA CBC programmes is the opportunity to deploy the activities of partners' organizations, and of course, to absorb the resources available.

Figure 19 What are the key demotivators for participation in IPA CBC funded initiatives? (E-survey among general public)

Key de-motivating factors	Weighted average	
	(1-lowest; 5- highest)	
The participation in IPA CBC projects has a heavy administrative burden		3.15
Project application procedure is too complex and long		3.15
It is difficult to pre-finance our participation in IPA CBC funded projects		3.13
It is difficult to find partners for our projects		2.75
Working in English is difficult		2.66
There is little experience of participation in international projects		2.62
We do not have enough staff to facilitate our organisation's participation in projects		2.46
Our staff does not have the necessary expertise and / or experience		2.41
International cooperation is not a top priority in our organization		2.11
Other		2.04

Difficult project preparation, heavy administrative burden and the need to pre-finance the project cash flow until the grant is reimbursed are considered as major demotivators in IPA CBC funded initiatives. Additionally, long procedures for projects' selection, alongside with the huge reporting documentation required, the procurement rules (being carried in English) and the



unwillingness of local companies to participate in such tenders (for the same reason) were specifically stressful factors for the smaller organisations on both sides on the borders. It should be recognised, however, that most of the above impediments originate from the Programmes' nature and the resp. EU regulatory framework, as well as that substantial efforts of the Programmes' management structures have been made as to reduce the administrative burden on the beneficiaries as well as to support them in the every-day project's tasks performance (especially to be noted the active role of the JTSs structures).

Most of the above barriers to cooperation are to be dealt with the programmes' management structures, and **further endeavour is to be made in the next programming period (2014-2020) as to reduce administrative burden and further simplify the Programmes' implementation.**

3.5 Consistency

Are positive / negative spill over into other economic, social or environmental policy areas being maximised / minimised?

- To what extent have the Programmes and the supported interventions reflected the real and broadly acknowledged needs within the Programme area?
- To what extent have the Programmes' interventions resulted in tackling common challenges and overcoming the discrepancies among the cross-border regions?
- How the co-funded projects addressed the environmental protection requirements and cross-cutting issues such as sustainable development, promotion of equal opportunities and non-discrimination and what were the achievements?
- To what extent did the institutional cooperation projects enhance capacity at all levels in the IPA beneficiary country to align to the Union's rules, standards, policies and practices with a view to EU membership?
- To what extent did the infrastructure type of projects enhance economic and social development beyond the level of their immediate users?

Low competitiveness of regional economy, aging population, low living standards and poor accessibility are among the major impediments to cross-border regions' development. The cross-border programmes are designed, hence, to present a coherent and effective response to those constraints, while focusing the interventions in the regions, where cross-border cooperation, economic and community integration can build further opportunities and boost potentials in order to mitigate these drawbacks.

To this view, the projects implemented under the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, have tackled the identified real and broadly acknowledged needs of the Programmes' areas and its population, e.g. the target groups of the funded interventions. Overall, they facilitated economic, social and institutional integration, while also addressing the most demanding needs, such as:

- Encouraging economic activity, in particular the development of SMEs, tourism, culture, and cross-border trade;
- Encouraging and improving the joint protection and management of natural and cultural resources, as well as prevention of natural and technological risks;
- Reducing isolation through improved access to transport, information and communication networks and services;
- Developing collaboration, capacity and joint use of infrastructures, in particular in sectors such as health, culture, tourism and education;
- Promoting the development of cross-border labour markets, local employment initiatives, gender equality and equal opportunities, training and social inclusion;
- Developing the institutional and administrative capacity at regional and local level and providing technical assistance for the preparation of new projects.



Figure 20 How the project's outputs and results reflected the real and broadly acknowledged needs of the target group(s)? (Project's review checklist)

Real and broadly acknowledged needs of the target group(s) tackled by CBC projects	Weighted average (1-lowest; 5- highest)
Encouraging and improving the joint protection and management of natural and cultural resources, as well as prevention of natural and technological risks	3.15
Encouraging economic activity, in particular the development of SMEs, tourism, culture, and cross-border trade	3.11
Reducing isolation through improved access to transport, information and communication networks and services, and cross-border water, waste and energy systems and facilities	3.02
Developing the institutional and administrative capacity at regional and local level and providing technical assistance for the preparation of new projects	2.99
Developing collaboration, capacity and joint use of infrastructures, in particular in sectors such as health, culture, tourism and education	2.96
Promoting the development of cross-border labour markets, local employment initiatives, gender equality and equal opportunities, training and social inclusion	2.92
Supporting links between urban and rural areas	2.42

As a whole, most of the activities financed under the Programmes were beneficial to the bordering regions in subject – i.e. not only on paper, but also in the field – as regards outputs and results, which were aimed in tackling certain common challenges and/or addressed at overcoming various obstacles encountered. Common problems were addressed through improvement of the local infrastructure, the development of joint touristic products, utilising the regional eco-resources, enhancement of social services and support to local business activities.

Figure 21 How the project's outputs and results resulted in tackling common challenges and overcoming the obstacles encountered in the border regions? (100% project's review checklist)

Common challenges and obstacles tackled by the IPA CBC projects	Weighted average (1-lowest; 5- highest)
Difficult physical access	3.72
Economic disparities	3.02
Public authorities' interest in working together	2.84
Socio-cultural differences	2.82
Legal and administrative barriers	2.39

A substantial number of projects were also targeted to overcoming difficult physical access in the regions, which is shown to be the biggest obstacle preventing joint socio-economic development and cooperation. This, however, should be viewed more as investments in public infrastructure for social cohesion rather than in interventions improving the access to remote, rural or mountainous areas. Additionally, economic disparities are also considered substantial challenge to be tackled in the next (2014-2020) programming period. On the other hand, some cooperation barriers proved to be difficult to cope with, such as distinct administrative cultures and legal barriers (especially in the area of health services, labour regulation, taxes, business development), and such barriers may persist despite the long history of cooperation or the number of successful projects implemented in the Programmes' areas. Legal and administrative barriers that are in some cases considered the most important ones cannot be solely addressed through cross-border programmes.

Overall, **the effects sought through the projects implemented on the needs of the target groups – understood as problem solving, mitigation of gaps and drawbacks, new development, etc. - is evaluated on average to have been achieved at a medium degree.** The needs of the target groups for joint protection and management of natural and cultural resources are met at most (among the other identified needs); also projects related to utilization of eco resources fully comply with the local needs for environmental protection and prevention of risks. The lowest reflection of the target group needs have been seen as regards the developing the links between urban and rural areas, i.e. there are almost no projects working to solve problems in this field. In view



of the next (2014-2020) programming period, and given the enhanced result-orientation approach of EU-funded programmes, a stronger focus is to be given (and resp. requirements set out) as regards justification of “needs–solutions” correlation within the new projects to be funded. Additionally, the impact over target groups is good to be further reported by project partners through concrete projects outputs (i.e. results from surveys, focus groups, interviews, etc.). Currently, under the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, such activities were rarely part of the projects.

Another weakness observed during the evaluation research, was the **lack of understanding on how to report achievements as regards horizontal issues**. The observation made is that these issues are often accepted as something marginal and not of great importance by project partners. On the other hand, the Programmes and the resp. **monitoring indicators were also not specifically designed as to monitor horizontal issues**; therefore it is not possible to measure the overall contribution of the Programmes to such aspects, unless an ad-hoc assessment is performed. The new IPA CBC Programmes (2014-2020) have already reflected some of the above weaknesses; however, it should be stressed that application of horizontal themes is to be strengthened also at project level of implementation.

Given the parameters of the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria – e.g. the target group, the geographical regions covered and the types of actions included – major Programmes’ **benefits arise in the form of increased cooperation on infrastructure and joint environmental activities that target the balanced regional development, as well as institutional capacity strengthening**:

- As regards, the *extent to which infrastructure type of projects (in general) enhance economic and social development*, beyond the level of their immediate users, the issue has already been communicated with reference to major changes (results) achieved (see answer of the preceding evaluation question). However, it should be noted that impacts of investments in infrastructures within the IPA CBC programmes to larger extent depends on the funds available – obviously with the limited Programmes’ resources it is hardly to believe that the investments made are to bring substantial improvements as regards local and regional development.
- As about *environmental protection* in concrete, there are projects implementing such measures successfully and had succeeded to rich the intended impacts. In addition, many cross-border cooperation projects are somehow addressing environment protection issues although it was not their main target. This indicates that stakeholders are aware of environmental protection policies and the need to reflect environmental issues when designing and implementing projects.
- With reference to *institutional cooperation* projects, and the way they enhance capacity at all levels, there were three main types of effects produced: (1) enhanced capacities to undertake cross-border cooperation activities; (2) tools to strengthen policy/programme management on both sides of the borders; and (3) development of joint planning, joint strategies, and effective joint management in various sectors. The capacity building for cross-border cooperation has been mainly developed through the creation or extension of partnerships across borders, by providing information and methodological tools on cross-border cooperation programmes, and by reinforcing cross-border structures.

As far as the level of *capacity achieved by the IPA beneficiary countries to align with the Union’s rules, standards, policies and practices in view to EU membership*, it shall be mentioned that the Programmes have an impact at the very local level, while major structural reforms that prepare the countries for the EU accession are targeted by other (national) Operational Programmes. However, by implementing common projects and engaging in joint-activities, several benefits have been shaped out:

- Public institutions and stakeholders become more familiar with the use of the instruments in place for implementing large scale EU interventions, and the transfer of know-how associated to certain institutional arrangements constitutes a decisive factor in this direction;
- Business entities gain experience in undergoing international cooperation experience, increasing their capacity to enlarge the area and the scale of their activity;
- Educational institutions and NGOs become familiar with the advantages of international cooperation in terms of knowledge share, common research and common policy making.



3.6 Synergy

Have the IPA CBC Programmes (2007-2013) in any way complemented and/or enhanced the effect of other related domestic/EU policies?

- To what extent were the Programmes' objectives coordinated with those of national and regional programmes?
Can synergies be objectively evaluated?
- How the outcomes of IPA CBC Programmes compare to those of others, similar programmes?
- Have the Programmes produced synergies or catalysed additional funding?
- Were the co-funded projects related to one or more objectives of the relevant EU macro-regional or Sea Basin strategies and initiatives? If yes, which ones and how did they contribute?
- Have the Programmes developed capacity and structures to make knowledge and concepts gained available to other regions ("capitalising on knowledge")?

The underpinning rationale for the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, was to encourage finding cross-border solutions to common problems. As such, that cross-border focus makes them unique amongst national and regional territorial development programmes given that such programmes support initiatives exclusively within national jurisdictions at various spatial scales. It was noted during the evaluation, that the border regions covered by the IPA CBC programmes experience specific challenges of development that demand joint actions and management to maximise their efficacy and impact. These challenges are exacerbated by the physical and other barriers discussed previously.

The process of objective setting for the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, has involved extensive consultation with a range of stakeholders including: ministries with direct interest in managing Structural Funds assistance, and other government institutions; regional development agencies; local public administrations; regional and local environment and environmental protection organizations; border social and economic partners; non-governmental organizations; and regional/local universities and other educational establishments. Coordination of objectives was further ensured through representation of Managing Authorities of the national Operational Programmes and Rural Development Programme as members/observers in the Joint Monitoring Committees of the cross-border programmes. This had helped to avoid overlapping between the mainstream and IPA CBC programmes, and ensure complementarities of interventions under the programmes. Additionally, the IPA CBC programmes' Managing Authority uses a reporting tool designed to cross-check data with other EU programmes financed under the Convergence Objective as to avoid double financing and overlaps at programme level.

However, **synergies between the IPA CBC programmes and national/regional programmes should be evaluated at project level**. In practice, such does not appear to happen beyond consideration of issues of funding duplication/overlap undertaken by the CBC programmes' management structures. There does not seem to be an obvious synergy (in terms of connecting project interventions funded by the CBC and mainstream programmes) for reasons of disparity of scale and focus of projects in each programme. Moreover, **IPA cross-programmes collaboration within the Interreg family remained limited**, despite the overlap between many geographical areas covered by Interreg programmes (i.e. RO-BG, RO-RS, GR-BG, GR-MK programmes). The evaluation has identified very few cases of cross-programmes' collaboration, where IPA CBC programmes' stakeholders stated that such overlap presented opportunities for further complementarities, and that care should be taken to avoid double-funding or unnecessary replication of activities.

As regards the Programmes' relation to EU macro-regional strategies and initiatives, it should be noted that there were neither programming nor implementation arrangements in place aimed at creating synergies between the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, and the EU Strategy for the Danube Region (EUSDR) and the EU Sea Basin Strategies (Black Sea). However, the Programmes' priority axes are somehow correlated with the respective strategies by targeting, on the one hand, development of infrastructure that facilitates connection between the bordering countries, and on the other hand, creation of linkages between business, education and research entities that can foster socio-economic activity and development.

E.g. the entire territory of the Bulgaria-Serbia IPA CBC Programme (2007-2013) is part of the EUSDR; both priority axes of the Programme correlate directly with the pillars of the Danube strategy - investments in physical and information infrastructure (under Measure 1.1) facilitated the improvement of mobility and multimodality connections as laid down under the first pillar of the EUSDR; the promotion of cultural and tourism heritage and encouraging the people to people networks are supported by the



Programme's Measure 2.2 "Sustainable development through efficient utilisation of regional resources" and 2.3 "People to people actions"; the projects financed under Programme's Measure 1.2 "Infrastructure concerning environmental issues" addressed the fields of actions within the second pillar of the Danube Strategy for management of environmental risks, preservation of biodiversity, landscapes and the quality of air, soils and water; the joint initiatives supported under Measure 2.1 "Links and networking on the institutional, business and education levels" aimed to developing the knowledge society through research, education and information technologies and investments in people and skills thus reflecting the third pillar of the Danube Strategy; the fourth pillar of the EUSDR, related to improvement of institutional capacity and co-operation and to tackling organised and serious crime, was reflected through Programme's Measure 2.1 "Links and networking on the institutional, business and education levels" and 2.3 "People to people actions".

Box 5 Case Study: "MOUNT A BIKE – development of mountain bicycle routes in Western Balkans" (2007CB16IPO006-2009-1-019- MOUNT A BIKE)

The **"MOUNT A BIKE"** project focuses on development of a new tourist product - mountain biking routes, along with the provision of new integrated cross-border services such as bike rental and bike repair, as well as promotion of the border region as a new adventure tourism destination. The biking routes are located in the northern part of Western Balkans, incorporating wide cross-border area in both Bulgaria and Serbia. The total length of mountain biking routes created is 375 km (275 km in Bulgaria and 100 km in Serbia); all were well signposted; some 140 km of existent mountain routes have been additionally cleaned from bushes and fallen trees; and some 24 picnic areas were set up. A bike rental service was organised (and continues to operate after project closure), with possibility for taking a bike at one side of the border and leaving it at the other side of the border.

The project also inspired new ideas for development of biking tourism, namely: a strategy for development of cycling tourism has been elaborated; an extension route (Godech-Svoege-Sofia) is under preparation; a biking route along the Danube River is also under implementation.

Additionally, taking into account that the Bulgaria-Turkey IPA CBC Programme (2007-2013) partially covers Black Sea coastal regions (e.g. Burgas and Kırklareli regions), the financed projects under the Programme contributed to the objectives of the EU Strategy for Blue Growth, Black Sea Synergy and the Convention on the Protection of the Black Sea against Pollution (referred to as "Bucharest Convention"). Also, being part of EU Green Belt Initiative (Initiative), both Bulgaria and Turkey have a solid ground for cooperation in the field of nature protection and sustainable use common natural resources. The evaluation analysis reveals that some of the joint cooperation projects, implemented on the territory of Burgas (Bulgaria) and Kırklareli (Turkey) included coastal and marine economic activities, as well as activities to promote the environmental protection of the Black sea coastal areas. Their implementation has had an added value for indirectly supporting the sustainable growth in the marine and maritime sector.

Box 6 Case Study: "Joint study of anthropogenic air pollution in the Burgas – Kırklareli cross-border area as a step towards future assessments on its impact on the population and the environment" (2007CB16IPO008-2013-3-025 - SAAP4FUTURE)

In view of the above, the **SAAP4FUTURE** project is the first joint study on air pollution for the Bulgaria - Turkey cross-border area, showing the complexity of the atmospheric transport and deposition mechanisms and providing a good basis for further studies. A joint survey on air quality status in the border region has been performed, that has revealed main problems with particulate matter and nitrogen oxides in urban areas, as well as ozone during the summer, mainly along the coast. Parallel field campaigns have been further organised for sampling the atmospheric deposition at Burgas, Ahtopol, Kırklareli and Kaynarca that has resulted in collection of more than 300 samples. A set up of a common database with data on chemical composition has been developed; air pollution maps, based on state-of-the-art air quality modelling system for the surface concentrations of main pollutants (ozone, nitrogen oxide, sulphur dioxide, and particulate matter) and deposition of sulphur and nitrogen for selected specific periods of 2014, have been further obtained.

Furthermore, the project has stimulated the communication and exchange of data between environmental experts from the two countries; the established collaboration between partners as well as joint working methodologies exchanged gave ground for further joint initiatives.

The current evaluation findings, and the e-survey carried out among project partners, acknowledged that **"capitalization of**



knowledge” is a concept recognized and widely accepted by the project implementing bodies as a way to ensure better access to the processes of cooperation in the cross-border areas. The evaluation results revealed that various dissemination channels are used by the project partners as to share project’s products and in this way – to spread new knowledge, concepts, findings, policy recommendation, practices and etc. on a bigger territory. The publication of the analysis reports and other products such as brochures and leaflets are ranked at highest degree as regards the capacity of partners to disseminate their outputs to other regions and organizations. Moreover, some of them considered the projects’ outputs an interesting source of know-how and a way for learning from the practical experiences and conclusions made by the others projects. It was also pointed out the high relevance of the materials and results in the policy making process by providing detailed and practical information on good practices for regional and national stakeholders.

Box 7 Case Study: “Digital Culture for Regional Cohesion: An innovative data base for raising the awareness in the cross-border area on the regional and European dimension of culture and its better joint utilisation” (2007CB16IPO007-2011-2-006 - Digital Culture for Regional Cohesion)

Digital Culture for Regional Cohesion is a pilot and demonstrational project that provides a model for digitising cultural content and promotes the existing cultural assets of the entire cross-border region between Bulgaria and the Former Yugoslav Republic of Macedonia. It well contributes to the efforts of global establishment of “Brand Europe” and “Brand EU”.

The project provides digital content on 400 cultural assets (200 on each side of the border) divided into the following categories: material assets, performing arts and events, traditions and customs, crafts, contemporary youth culture and digital library. Further, the following forms of digitisation of cultural content have been used: digital descriptions, virtual tours, videos, 360-degree panoramic photos, regular digital photos, 3D images, GPS coordinates of cultural sites. The digital content is uploaded on a **user-friendly three-lingual interactive web-portal**, which increases the outreach of the project messages and information.

The **documentary film-making video tutorial** provides knowledge about basic techniques for amateur film-making, such as shooting and editing (<http://digital-culture.eu/en/learning/documentary-film-making-video-tutorial>). It was used in the training of 20 high-school students (10 on each side of the border), who subsequently acted as “digital culture advocates”, participated in the collection and digitisation of the cultural content, and further made their own video films on cultural and youth topics.



IV. CONCLUSIONS AND RECOMMENDATIONS

This section presents the conclusions from the impact evaluation, based on the findings of Section III, as well as recommendations for more result-oriented Programmes/projects in the 2014-2020 period. These are presented in line with the enhanced Evaluation Framework adopted, i.e. following the **6 major evaluation issues** analysed.

Evaluation Issue	Conclusions	Recommendations
<p>EFFECTS OF CROSS-BORDER COOPERATION</p>	<p>The priorities defined under each of the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, have covered the whole range of actions and priorities as defined in the EU regulations. This respectively led to the fact that strategies remained wide and with little prioritization between objectives. The “priorities” of the Programmes were often the aggregation of a large number of interventions under broad multi-faceted headings.</p> <p>The EU Regulation (1085/2006) additionally ambitioned the contribution of IPA CBC programmes to economic integration and strengthened competitiveness of the border regions. In this respect, the evaluation found that cross-border cooperation projects have been largely focused on improving protection of natural resources and more effective risk prevention as well as to easing transport accessibility or access to public services, but these contributions remained at a rather local level and without generating clear effects on the territory as a whole. Hence, it can be concluded that the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, were primarily focused on addressing common challenges and less on creating new opportunities linked to the exploitation of complementary assets over the borders. In this context, the Programmes have also often been used as an instrument aimed primarily at developing cooperation and linkages, without necessarily envisaging a strong leverage of this cooperation to a wider economic integration.</p> <p>However, one of the major impediments to achieving substantial and visible long-term impacts is that IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, with spent budget of about EUR 87.9 million (excluding funds under “technical assistances” axes), and supported 393 cross-border cooperation</p>	<p>(1) The Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, should more pro-actively steer the bottom-up demand of future project proposals with a view to achieving a more visible overall programme impact (i.e. “anticipatory management” of the project portfolio). For this, the Programmes’ management could adopt different approaches, namely: (a) through well-targeted communication measures, the Programmes’ management could support the project generation process by highlighting important topics for co-operation and encouraging mobilisation of project players capable of tackling such aspects (e.g. through thematic workshops, surveys, awareness raising, etc.); (b) Programmes’ management could also consider launching specific project-calls dedicated to “strategic operations” which tackle important development needs and have significant implications for territorial integration; (c) during the approval process, Programmes’ management can focus on projects which generate durable improvements in relation to issues of a strategic cross-border relevance and on projects contributing to the establishment or further development of a joint and durable problem-solving capacity.</p> <p>(2) A standard catalogue of types of interventions and impact areas of cross-border programmes could be elaborated, which might serve as a tool of evaluation and monitoring of Programmes’ resources on selected priority areas, and which might also become a basis for construction of the system of indicators (see the recommendation</p>



Evaluation Issue	Conclusions	Recommendations
	<p>projects, are still small in terms of relative budget size. It appears clearly that with such resources allocated (average per capita allocations amounts to some EUR 12), the IPA CBC initiatives remained marginal as compared to those allocated through other European funds. Hence, the impact of the Programmes should be seen in the light of these budgets.</p> <p>Besides being wide and open, the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, were characterised also by two additional features: (1) a demand-driven and bottom-up approach, and (2) a strong focus on cooperation as an end. Hence, the results achieved through the Programmes were: (1) very diverse, contributing to the enhancement of factors of growth, which may have improved enterprises competitiveness, improved tools for better protection of the environment and prevention of risk, as well as to facilitating access to markets and public services; but (2) with no clear contribution to significantly higher economic and social integration of the bordering areas. Results were not measurable on an aggregate basis as indicators did not permit a quantitative assessment of the main effects of the cross-border cooperation outputs. The analysis was, therefore, based primarily on a qualitative approach and findings (e.g. 100% projects' review done by the Evaluation Team, e-surveys and case studies).</p> <p>A substantial result achieved, however, is the creation or consolidation of a regional identity. This should be understood as the increased acknowledgment by stakeholders of the value of cooperating across borders and of an improved social capital (including knowledge of the partners on the either side of the borders and a better understanding of the potential for cooperation). A stable tendency of increasing stakeholders' interest towards cross-border initiatives has been examined during the evaluation research, which is a good prerequisite for enhanced results to be achieved in the next programming period.</p> <p>It could also be revealed that projects funded have created certain visible tangible impacts expressed in improved access to services and public infrastructure, as well as intangible impacts as regards awareness raising, improved social cohesion and enhanced capacity for joint planning, problem solving and development. Additional benefit of cross-border cooperation for project part-</p>	<p>below). Namely: (a) being a tool for evaluation, it would assist the achievement of funds' concentration; and (b) being a basis for construction of a standard catalogue of indicators, it would provide for ongoing monitoring of the degree of achievement of a given type of impact, and also would support the process of project selection by choosing the projects which have the strongest influence on a given impact area.</p> <p>(3) A uniform indicators' system should be developed for the Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, providing for common understanding to the projects and programmes indicators and for better monitoring of Programmes' progress and achievement of the set out objectives. The system of indicators could be based on the assumption according to which the impact of a programme (or a group of projects) may be evaluated by counting the absolute number of projects (or their relative number – a percentage of the number of projects) which meet certain criteria, e.g. they make a 'single' contribution to the impact on a given area. The catalogue of indicators should, therefore, be created on the basis of a standard catalogue of types of intervention, while making a clear differentiation between programmes' and projects' indicators. Beneficiaries should exclusively use indicators from the adopted system and should be obliged to report them.</p>



Evaluation Issue	Conclusions	Recommendations
	<p>ners was the exchange of knowledge and transfer of good practices, increased knowledge and capacities in the project partner organisations, which often led to subsequent intangible impacts like changes in organisational cultures and institutional practices or even influence on policy. In cooperating with partners, projects also utilised the synergies of complementary expertise and achieved greater publicity, bringing socially relevant themes to the public's and politicians' awareness. In turn, this fostered a change in attitudes and behaviour and influenced policy-making by building community support and involvement. Furthermore, projects resulted in new contacts and (informal or formal) networks, which often resulted in follow-up activities and collaborations, and opened doors to opportunities.</p>	
<p>DURABILITY OF COOPERATION</p>	<p>It is difficult to assess the extent to which actual results will be sustained and constitute a foundation on which cross-border cooperation and integration can be further built. Both the issues of financial and institutional sustainability are at stake in this respect.</p> <p>In some cases, sustainability requires a continuation of projects and depends on the access to funds to ensure such continuation of common services/use of infrastructures. This includes joint specialised services, shared management processes, and maintenance of infrastructures built.</p> <p>Project stakeholders interviewed in all of the case studies have consistently expressed doubts as to whether domestic public funding sources could take over from IPA CBC programmes. The main reason they invoked for this is that using different funding streams in parallel is very difficult, owing to national differences in funding conditions, timing, eligibility of actions, and so forth. In addition, several interviewees stated that money from the national budget or from mainstream EU programmes was not easy to mobilize for peripheral border areas. In this regard, financial resources provided by IPA CBC programmes represent a key value added but requiring in the meantime a long term commitment for ensuring the sustainability of results.</p>	<p>(4) Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, should adopt a more proactive approach to ensuring that their future operations are durable and that, if possible, projects become self-sustaining after the end of EU-funding. This is particularly recommended for future co-operation initiatives which address problems or development challenges requiring a continuing effort in order to be tackled effectively.</p> <p>(5) Alongside the needs and specificities of each programme, it could be recommended an approach combining incentives and complementary operational provisions. <i>Incentives</i> could, for example, be the launching of targeted calls for specific projects which focus on the establishment of new and durable co-operation structures or topical networks, and also the allocation of larger budgets for strategic and large-scale initiatives which are likely to generate significant and lasting improvement in a programme area. <i>Complementary operational provisions</i> should require that strategic initiatives and projects establishing new and durable co-operation structures/topical networks have to undergo a two-step feasibility check procedure or foresee that a decreasing financial support is allocated to follow-up projects which merely represent a simple</p>



Evaluation Issue	Conclusions	Recommendations
	<p>However, the evaluation has shown that good cases of sustainability of IPA CBC projects results still exist, mainly when tangible results from the projects are adopted in practice and when public authorities take ownership of them; and also when the private sector shows a clear interest.</p>	<p>continuation of a previously realised operation.</p>
<p>ADDED VALUE OF COOPERATION</p>	<p>The cross-border cooperation at external EU borders, in general, are characterised by a less-developed maturity or a more recent history of co-operation. Here, IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, generated a noticeable socio-cultural added value whereas the wider socio-economic and political-institutional added value was limited.</p> <p>The Programmes' support often generated a visible socio-cultural added value, which would not have emerged without Community funding or only much later. Cultural projects, and in particular the many micro-projects supporting people-to-people activities, made a strong contribution. They increase the mutual knowledge/awareness about shared historical roots and cultural assets or favoured direct interpersonal contacts which helped both sides get to know each other and build up mutual trust.</p> <p>The socio-economic added value generated by the Programmes' support was relatively small. Substantial improvements in the field of cross-border business-development and cross-border labour market development cannot be observed. Noticeable achievements could only be observed in the field of cross-border tourism development. This was either due to the fact that such projects were rare or because they were spread over relatively a large co-operation area but with scarce budgets. The emergence of a wider socio-economic added value was also hampered by the existence of legal/administrative barriers, which were more substantial if compared to the internal EU-borders.</p> <p>Considered from a more strategic viewpoint, the wider political-institutional added value generated by the Programmes' support was weak during the period 2007-2013. Existing cross-border structures were only in a few cases directly linked to strategic programme-level processes. In other cases, a direct involvement</p>	<p>(6) Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, should focus assistance to actions that bring clear cross-border added value - for example: increasing cross-border competitiveness through innovation and research and development; connecting intangible networks (services) or physical networks (transport) to strengthen cross-border identity as a feature of European citizenship; promotion of cross-border labour market integration; and cross-border water management and flood control.</p>



Evaluation Issue	Conclusions	Recommendations
	<p>did not take place because an establishment of cross-border structures had only started very recently. IPA CBC support had, however, created in most cases at least a broader awareness of cross-border co-operation both as an opportunity and as a joint (political) responsibility. It sometimes also contributed to increase the visibility of / awareness about Community policies and principles, and helped to overcome domestic institutional passivity and at a certain extent also administrative and institutional barriers in the bilateral co-operation.</p> <p>At project-level, however, IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, contributed significantly to the establishment of cross-border networks and long-term partnership frameworks. These networks constituted (together with the existing but often still weak cross-border structures) a starting point for building up a more joint and durable problem-solving capacity in the future.</p>	
<p>UTILITY</p>	<p>The IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, produced effects in three major areas of change (performance-, integration- and investment-related results), simultaneously – they contribute to EU integration, socio-economic development of the cooperation area and improved performance of participating organisations and individuals.</p> <p>The evaluation results obtained show a steady trend towards establishment of long-term partnerships on both sides of the borders, which was actually one of the Programmes’ objectives. The vast range of possible areas of action the Programmes were offering represent a good motivation for participation in general, since participants have larger options to implement their ideas and build on their experience; unlike other (national) Operational Programmes that are much more restricted in the possible spheres of interventions and eligibility of applicants. In some cases (and for some applicants), the IPA CBC Programmes have been the only possible funding source for implementing their ideas.</p> <p>The main identified reasons determining the high level of demand are the pre-existing relations among project partners facilitating project generation and a</p>	<p>(7) Further stimuli should be searched for enlarging the projects partners’ representation in the Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, especially such from less developed regions as well as smaller municipalities and settlements. It could also be thought of providing stimuli for potential applicants without specific “EU project” experience (but with specific such in other fields relevant for the projects) to also join the unique opportunity of cross-border partnership and cooperation.</p> <p>(8) It could be further thought on introducing certain limitations for number of projects per organisation to be funded within one programming cycle. This would give better chances to wider potential applicants to take part in the Programmes.</p> <p>(9) Further efforts should be placed in upgrading the project management skills and competences of project beneficiaries.</p>



Evaluation Issue	Conclusions	Recommendations
	<p>genuine interest in the Programmes that was not reduced by the existence of alternative sources of financing available. Most of the projects have been initiated and realised by local authorities, NGOs and educational institutions and these same groups have benefited from project results, transferring the benefits also to local SMEs and general public (individuals) – i.e. young people, entrepreneurs, unemployed, students, teachers, etc. The last have been involved as direct beneficiaries in many of the funded actions thus receiving immediate benefits, making in this sense the projects intangible results more sustainable.</p>	
<p>CONSISTENCY</p>	<p>Overall, the effects sought through the projects implemented and the way they have reflected the real and broadly acknowledged needs of the target groups – understood as problem solving, mitigation of gaps and drawbacks, new development, etc. - is evaluated on average to have been moderately achieved. The needs of the target groups for joint protection and management of natural and cultural resources are met at most (among the other identified needs); also projects related to utilization of eco resources fully comply with the local needs for environmental protection and prevention of risks. The lowest reflection of the target group needs have been on developing the links between urban and rural areas, i.e. there were almost no projects working to solve problems in this field.</p> <p>The IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, have also benefited the non-EU member states by facilitating their transition to the EU practices on a multi-level basis. However, it shall be mentioned that the Programmes have an impact at the very local level, while major structural reforms that prepare the countries for the EU accession are targeted by other (national) Operational Programmes.</p> <p>As far as the level of capacity achieved by the IPA beneficiary countries to align with the Union’s rules, standards, policies and practices in view to EU membership, by implementing common projects and engaging in joint-activities, several benefits have been shaped out: (1) Public institutions and stakeholders become more familiar with the use of the instruments in place for implementing large scale EU interventions, and the transfer of know-how associated to certain</p>	<p>(10) In view of the next (2014-2020) programming period, and given the enhanced result-orientation approach of the EU-funded programmes, a stronger focus is to be given (and resp. requirements set out) as regards justification of “needs–solutions” correlation within the new projects to be funded. Additionally, the impact over target groups should be further reported by project partners through concrete projects outputs (i.e. results from surveys, focus groups, interviews, etc.).</p> <p>(11) It is recommendable to be considered a smooth transition from an approach funding "typological" interventions (i.e. such making a clear distinction between "investment" and "soft" projects) towards an approach selecting more “integrated” actions, thus realising in practice the 'result-orientation' of the Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria.</p> <p>(12) Further (via interventions funded) strengthening integration and harmonisation between the partnering countries is needed. This is especially valid as regards the pressing agendas in light of EU accession and mostly in terms of adoption of <i>acquis communautaire</i> by the candidate countries.</p>



Evaluation Issue	Conclusions	Recommendations
	<p>institutional arrangements constitutes a decisive factor in this direction; (2) Business entities gain experience in international cooperation experience, increasing their capacity to enlarge the area and the scale of their activity; and (3) Educational institutions and NGOs become familiar with the advantages of international cooperation in terms of knowledge share, common research and common policy making.</p>	
<p>SYNERGY</p>	<p>Coordination with other mainstream programmes remained limited. Such coordination regularly existed at design stage through the involvement of Managing Authorities of the mainstream ERDF programmes in the preparation of the IPA CBC programmes or by involving members of Steering Committees to screen for complementarities in mainstream programmes in their field of specialization. However, at implementation stage national/regional programmes and IPA CBC programmes often ran in parallel, with little involvement from national or regional agencies.</p> <p>Moreover cross-programme collaboration within the Interreg family also remained limited, despite the overlap between many geographical areas covered by Interreg and IPA CBC programmes. The evaluation has identified very few cases of cross-programme collaboration. It is interesting to note that such overlap presented opportunities for complementarities, but it care should also be taken as to avoid double-funding or unnecessary replication of activities. For these reasons, the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, remained rather isolated without fully exploiting the potential complementarity between IPA CBC projects and activities supported by regional/ national budget and by other structural funds programmes.</p> <p>The evaluation has also shown that transfer of learning and knowledge within individual programmes, especially within a specific thematic fields, remained limited. In this sense, the IPA CBC Programmes (2007-2013), managed by the Republic of Bulgaria, have missed an opportunity to use capitalisation to enhance effects at a more macro level. At project level for instance, knowledge of specific cooperation themes or technologies, including methods of environmental protection and tools, was generated and shared between the partners. But beyond</p>	<p>(13) The Interreg-IPA Programmes (2014-2020), managed by the Republic of Bulgaria, should – if not already undertaken – establish a more pro-active and ongoing inter-action with the convergence and regional competitiveness and employment programmes, as well as with other territorial co-operation programmes, operating in their co-operation areas. This would help to ensure complementary, co-ordination and synergy (e.g. joint thematic workshops/seminars, regular participation of programme delegates in Monitoring Committee meetings of other programmes, etc.).</p> <p>(14) Programmes’ management structures should continue implementing the mechanism for avoiding duplication of already financed activities, and to finance those which have the capacity for valorisation and multiplication of previously achieved results, and which introduce innovative methodologies with clear cross-border added value and a higher territorial impact.</p> <p>(15) “Knowledge capitalisation” of programmes’ outputs is considered a good starting point not only to set up the future policy learning platforms, but also for the new (2014-2020) programmes to take use of the previous results as a benchmark for assessing applications, in terms of determining their innovative character and added value.</p>



Evaluation Issue	Conclusions	Recommendations
	<p>the first circle of actors directly involved in a project, very little knowledge sharing or transfer of practices, policy tools or learning took place. All the case studies highlighted the rather weak dissemination at horizontal level within and between the Programmes, as well as the absence of mechanisms to ensure sharing of learning (in a sector or on a common topic). Most projects have been implemented in isolation. When sharing of learning occurred, knowledge exchange has been mostly realised at inter-personal level through mechanisms such as events, workshops and public relations. Links between projects and programmes exist at the level of project progress reports and individual exchanges only.</p>	



Annex 1: Comparative evaluation findings (per Programme)

PROGRAMME	STRATEGIC FRAMEWORK	
<p>BULGARIA-SERBIA IPA CBC PROGRAMME (2007-2013)</p>	<p>PA-1 “Development of small-scale infrastructure”</p> <ul style="list-style-type: none"> • M-1.1 Physical and information infrastructure • M-1.2 Infrastructure concerning environmental issues • M-1.3 Assistance for project preparation 	<p>PA-2 “Enhancing capacity for joint planning, problem solving and development”</p> <ul style="list-style-type: none"> • M-2.1 Links and networking on institutional, business and educational levels • M-2.2 Sustainable development through efficient utilization of regional resources • M-2.3 People to people actions
<p>BULGARIA – THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA IPA CROSS-BORDER PROGRAMME (2007-2013)</p>	<p>PA-1 “Economic Development and Social Cohesion”</p> <ul style="list-style-type: none"> • M-1.1 Economic development • M-1.2 Social cohesion • M-1.3 Project preparation 	<p>PA-2 “Improvement the quality of life”</p> <ul style="list-style-type: none"> • M-2.1 Utilisation of eco resources • M-2.2 Utilisation of cultural resources
<p>BULGARIA – TURKEY IPA CROSS-BORDER PROGRAMME (2007-2013)</p>	<p>PA-1 “Sustainable social & economic development”</p> <ul style="list-style-type: none"> • M-1.1 Improvement of the social development and social cohesion links • M-1.2 Economy competitiveness increasing • M-1.3 Infrastructural support for the improvement of the economic potential of the co-operation area 	<p>PA-2 “Improvement the quality of life”</p> <ul style="list-style-type: none"> • M-2.1 Protection of environment, nature and historical and cultural heritage • M-2.2 Capacity building for sustainable use of natural resources, cultural and historical heritage










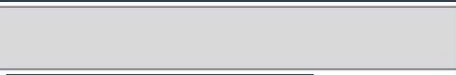










PROGRAMME	INPUTS (Number of Projects)			
BULGARIA-SERBIA IPA CBC PROGRAMME (2007-2013)	<p>Total Number of Projects (by priority axis) 155</p> <ul style="list-style-type: none"> PA-1 "Development of small-scale infrastructure" (34%) PA-2 "Enhancing capacity for joint planning, problem solving and development" (66%) 	Measure	Number	(%)
		M-1.1 Physical and information infrastructure	29	19%
		M-1.2 Infrastructure concerning environmental issues	8	5%
		M-1.3 Assistance for project preparation	3	2%
		M-2.1 Links and networking on institutional, business and educational levels	37	24%
		M-2.2 Sustainable dev. through efficient utilization of regional resources	43	28%
		M-2.3 People to people actions	35	23%
BULGARIA – THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA IPA CROSS-BORDER PROGRAMME (2007-2013)	<p>Total Number of Projects (by priority axis) 100</p> <ul style="list-style-type: none"> PA-1 "Economic Development and Social Cohesion" (55%) PA-2 "Improvement the quality of life" (45%) 	Measure	Number	(%)
		M-1.1 Economic development	24	24%
		M-1.2 Social cohesion	25	25%
		M-1.3 Project preparation	5	5%
		M-2.1 Utilisation of eco resources	25	25%
		M-2.2 Utilisation of cultural resources	21	21%
BULGARIA – TURKEY IPA CROSS-BORDER PROGRAMME (2007-2013)	<p>Total Number of Projects (by priority axis) 138</p> <ul style="list-style-type: none"> PA-1 "Sustainable social & economic development" (59%) PA-2 "Improvement the quality of life" (41%) 	Measure	Number	(%)
		M-1.1 Improvement of the social development and social cohesion links	31	22%
		M-1.2 Economy competitiveness increasing	27	20%
		M-1.3 Infrastructural support for the improvement of the economic potential of the co-operation area	23	17%
		M-2.1 Protection of environment, nature and historical and cultural heritage	42	30%
		M-2.2 Capacity building for sustainable use of natural resources, cultural and historical heritage	15	11%


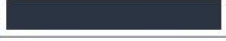








PROGRAMME	INPUTS (Budget Structure)	Measure	Total (EUR)	(%)		
BULGARIA-SERBIA IPA CBC PROGRAMME (2007-2013)	<p>Budget Structure (verified amounts) EUR 29 855 361.60</p> <ul style="list-style-type: none"> PA-1 "Development of small-scale infrastructure" (62%) PA-2 "Enhancing capacity for joint planning, problem solving and development" (38%) 	M-1.1 Physical and information infrastructure	€ 14 729 141.88	49%		
		M-1.2 Infrastructure concerning environmental issues	€ 3 648 718.30	12%		
		M-1.3 Assistance for project preparation	€ 149 578.79	1%		
		M-2.1 Links and networking on institutional, business and educational levels	€ 4 153 488.99	14%		
		M-2.2 Sustainable dev. through efficient utilization of regional resources	€ 5 026 052.15	17%		
		M-2.3 People to people actions	€ 2 148 381.49	7%		
		BULGARIA – THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA IPA CROSS-BORDER PROGRAMME (2007-2013)	<p>Budget Structure (verified amounts) EUR 17 715 365.82</p> <ul style="list-style-type: none"> PA-1 "Economic Development and Social Cohesion" (46%) PA-2 "Improvement the quality of life" (54%) 	M-1.1 Economic development	€ 3 363 782.24	19%
M-1.2 Social cohesion	€ 4 231 467.52			24%		
M-1.3 Project preparation	€ 563 047.44			3%		
M-2.1 Utilisation of eco resources	€ 5 962 255.55			34%		
M-2.2 Utilisation of cultural resources	€ 3 594 813.07			20%		
BULGARIA – TURKEY IPA CROSS-BORDER PROGRAMME (2007-2013)	<p>Budget Structure (verified amounts) EUR 24 451 134.39</p> <ul style="list-style-type: none"> PA-1 "Sustainable social & economic development" (49%) PA-2 "Improvement the quality of life" (51%) 			M-1.1 Improvement of the social development and social cohesion links	€ 2 092 483.44	9%
				M-1.2 Economy competitiveness increasing	€ 1 885 148.45	8%
		M-1.3 Infrastructural support for the improvement of the economic potential of the co-operation area	€ 8 076 219.17	33%		
		M-2.1 Protection of environment, nature and historical and cultural heritage	€ 11 198 933.26	46%		
		M-2.2 Capacity building for sustainable use of natural resources, cultural and historical heritage	€ 1 198 350.07	5%		



PROGRAMME	Thematic Fields of Interventions					
BULGARIA-SERBIA IPA CBC PROGRAMME (2007-2013)	Thematic Field of Intervention	Projects (number)	(%)		Funds absorbed (EUR)	(%)
	Tourism and cultural heritage	37	24%		€ 6 118 390.80	20%
	Competitiveness, business and SME development, trade and investment	28	18%		€ 6 043 000.22	20%
	Youth and Education	25	16%		€ 4 190 277.95	14%
	Environmental protection, climate change and risk prevention	20	13%		€ 2 143 444.00	7%
	Transport and public infrastructures	15	10%		€ 4 191 661.42	14%
	Employment, labour mobility and social inclusion	13	8%		€ 2 046 303.12	7%
	Local and regional governance, planning and administration capacity building	11	7%		€ 2 844 331.51	10%
	Research, technological development and innovation and ICT	6	4%		€ 2 277 952.58	8%
BULGARIA – THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA IPA CROSS-BORDER PROGRAMME (2007-2013)	Thematic Field of Intervention	Projects (number)	(%)		Funds absorbed (EUR)	(%)
	Tourism and cultural heritage	29	29%		€ 5 277 645.64	30%
	Environmental protection, climate change and risk prevention	23	23%		€ 4 314 269.31	24%
	Employment, labour mobility and social inclusion	16	16%		€ 1 772 674.96	10%
	Competitiveness, business and SME development, trade and investment	13	13%		€ 2 548 845.23	14%
	Youth and Education	12	12%		€ 2 554 662.46	14%
	Local and regional governance, planning and administration capacity building	5	5%		€ 1 074 523.00	6%
	Transport and public infrastructures	1	1%		€ 82 029.76	0%
	Research, technological development and innovation and ICT	1	1%		€ 90 715.46	1%



BULGARIA – TURKEY IPA CROSS-BORDER PROGRAMME (2007-2013)	Thematic Field of Intervention	Projects (number)	(%)		Funds absorbed (EUR)	(%)
	Tourism and cultural heritage	41	30%		€ 7 891 236.95	32%
	Youth and Education	22	16%		€ 4 326 328.65	18%
	Environmental protection, climate change and risk prevention	19	14%		€ 3 479 236.90	14%
	Competitiveness, business and SME development, trade and investment	19	14%		€ 1 508 444.33	6%
	Employment, labour mobility and social inclusion	15	11%		€ 1 983 533.46	8%
	Local and regional governance, planning and administration capacity building	11	8%		€ 3 101 543.13	13%
	Transport and public infrastructures	8	6%		€ 1 448 949.03	6%
	Research, technological development and innovation and ICT	3	2%		€ 711 861.94	3%



PROGRAMME	Level of Achievements (outputs)		Level of Achievements (results)																								
<p>BULGARIA-SERBIA IPA CBC PROGRAMME (2007-2013)</p>	<table border="1"> <thead> <tr> <th data-bbox="607 288 983 320">Programmes' outputs</th> <th colspan="2" data-bbox="983 280 1464 344">Level of achievement</th> </tr> <tr> <td></td> <td colspan="2" data-bbox="983 320 1464 344">Weighted average (1-lowest; 5- highest)</td> </tr> </thead> <tbody> <tr> <td data-bbox="607 344 983 376">New ways of working</td> <td data-bbox="983 344 1373 376"></td> <td data-bbox="1373 344 1464 376">2.99</td> </tr> <tr> <td data-bbox="607 376 983 408">New knowledge or analysis</td> <td data-bbox="983 376 1373 408"></td> <td data-bbox="1373 376 1464 408">2.92</td> </tr> <tr> <td data-bbox="607 408 983 440">Community integration</td> <td data-bbox="983 408 1373 440"></td> <td data-bbox="1373 408 1464 440">2.83</td> </tr> <tr> <td data-bbox="607 440 983 472">Changes to policy or public behaviour</td> <td data-bbox="983 440 1373 472"></td> <td data-bbox="1373 440 1464 472">2.80</td> </tr> <tr> <td data-bbox="607 472 983 504">Product or services</td> <td data-bbox="983 472 1373 504"></td> <td data-bbox="1373 472 1464 504">2.72</td> </tr> <tr> <td data-bbox="607 504 983 536">Investment or infrastructure</td> <td data-bbox="983 504 1373 536"></td> <td data-bbox="1373 504 1464 536">2.65</td> </tr> </tbody> </table>	Programmes' outputs	Level of achievement			Weighted average (1-lowest; 5- highest)		New ways of working		2.99	New knowledge or analysis		2.92	Community integration		2.83	Changes to policy or public behaviour		2.80	Product or services		2.72	Investment or infrastructure		2.65		<p>Programme's Results</p> <ul style="list-style-type: none"> PERFORMANCE-RELATED CHANGE: 34% INVESTMENT-RELATED CHANGE: 32% INTEGRATION-RELATED CHANGE: 34%
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PROGRAMME	Added Value of Cooperation	Programme's Impacts			
BULGARIA-SERBIA IPA CBC PROGRAMME (2007- 2013)	<p>CBC Added Value</p> <ul style="list-style-type: none"> Organisational and policy learning Building structures for future cross-border cooperation Generating critical mass Finding solutions to common problems 	Tangible impacts	Level of achievement Weighted average (1-lowest; 5- highest)	Level of achievement Weighted average (1-lowest; 5- highest)	Intangible impacts
		Improved access to services	3.18	2.91	Raising awareness
		Enhanced sustainability of natural, cultural and historical heritage	2.67	2.84	Building (institutional) capacity
		Improved access to public infrastructure	2.66	2.63	Improving social cohesion
		Improved competitiveness, business development and job creation	2.59	2.50	Changing attitudes and behaviour
		Reduced environmental (man-made, natural) risks	2.50	2.32	Leveraging synergies
		Increased energy efficiency	2.49	2.31	Influencing policies
BULGARIA – THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA IPA CROSS-BORDER PROGRAMME (2007- 2013)	<p>CBC Added Value</p> <ul style="list-style-type: none"> Organisational and policy learning Building structures for future cross-border cooperation Generating critical mass Finding solutions to common problems 	Tangible impacts	Level of achievement Weighted average (1-lowest; 5- highest)	Level of achievement Weighted average (1-lowest; 5- highest)	Intangible impacts
		Improved access to public infrastructure	3.32	3.31	Raising awareness
		Enhanced sustainability of natural, cultural and historical heritage	3.11	2.85	Improving social cohesion
		Increased energy efficiency	2.93	2.59	Changing attitudes and behaviour
		Improved access to services	2.83	2.51	Building (institutional) capacity
		Improved competitiveness, business development and job creation	2.80	2.47	Leveraging synergies
		Reduced environmental (man-made, natural) risks	2.53	2.02	Influencing policies
BULGARIA – TURKEY IPA CROSS-BORDER PROGRAMME (2007- 2013)	<p>CBC Added Value</p> <ul style="list-style-type: none"> Organisational and policy learning Building structures for future cross-border cooperation Generating critical mass Finding solutions to common problems 	Tangible impacts	Level of achievement Weighted average (1-lowest; 5- highest)	Level of achievement Weighted average (1-lowest; 5- highest)	Intangible impacts
		Improved access to public infrastructure	3.69	3.18	Leveraging synergies
		Reduced environmental (man-made, natural) risks	3.63	3.12	Raising awareness
		Enhanced sustainability of natural, cultural and historical heritage	3.23	3.10	Influencing policies
		Improved access to services	3.11	3.07	Building (institutional) capacity
		Improved competitiveness, business development and job creation	3.11	3.04	Changing attitudes and behaviour
		Increased energy efficiency	3.00	2.98	Improving social cohesion

