



ANNEX 4: Methodological descriptions of Interreg VI-A RO-BG indicators - SO 4.2

Priority 3 ‘An educated region’

February 2024

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SO 4.2 Improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including by fostering resilience for distance and on-line education and training



The Programme will support joint actions in the field of education and training (including joint learning and training schemes, partnership and other initiatives), joint cross-border learning mobility programmes (including internships, placements and student exchanges) and investments in educational infrastructure and facilities.

The supported actions include both soft measures (such as education and learning schemes, partnerships, programmes, initiatives, trainings etc.) and hard measures (for example, investments in educational infrastructure, endowments, etc.).


All the types of actions will be implemented through competitive calls.

Output Indicator	Target (2029)	Result Indicator	Target (2029)
RCO85 Participations in joint training schemes	2,600 participations	RCR81 Completion of joint training schemes	1,560 participants
RCO87 Organizations cooperating across borders	33 organisations	RCR84 Organizations cooperating across borders after project completion	16 organisations
PSO4 Investments in education, training and life-long learning services	13 investments	PSR4 Annual users of the supported investments in education, training and life-long learning services	7,800 users


RCO85 Participations in joint training schemes

Row ID	Field	Indicator metadata
1	Indicator code	RCO85
2	Indicator name	Participations in joint training schemes
3	Measurement unit	Participations
4	Type of indicator	Output
5	Policy objective(s)	PO4. A more social and inclusive Europe implementing the European Pillar of Social Rights
6	Specific objective	<p>The indicator is used for monitoring interventions under SO 4.2 Improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including by fostering resilience for distance and on-line education and training, in respect to:</p> <ol style="list-style-type: none"> Joint actions aimed at enhancing cross-border collaboration in the field of education and training, to create new opportunities for cross-border mobility Joint actions aimed at increasing access and participation to education and training, including for disadvantaged groups (persons with low education levels and/or affected by poverty)
7	Definition concepts and	<p>EC instructions:</p> <p>The indicator counts the number of participations in joint training schemes. Participations in a joint training scheme are intended to be counted as registered participants who started the training.</p> <p>Programme indications:</p> <div style="display: flex; align-items: center; margin-top: 10px;">  <div style="border: 1px solid green; border-radius: 15px; padding: 10px; background-color: #e8f5e9;"> <p>A joint training scheme implies:</p> <ul style="list-style-type: none"> the involvement of organizations from both countries in the development, delivery and post-delivery (for example assessing the satisfaction of the participants) of the training scheme; balanced participation from both sides of the border. </div> </div> <p>A joint training scheme requires building knowledge in a certain topic and involves the training of participants over several sessions.</p> <div style="display: flex; align-items: center; margin-top: 10px;">  <div style="border: 1px solid orange; border-radius: 15px; padding: 10px; background-color: #ffe0b2;"> <p>A one-off meeting/event/internal session where information is disseminated should not be considered as a training scheme.</p> </div> </div> <p>Participation is understood as attending in physical or online training activities (events, self-learning modules, etc.).</p> <p>The training activities should aim at issuing a certificate of completion, of the training in line with the conditions set by the Applicant's Guideline or at recording the confirmed completion.</p>

9	Data collection	<p>EC instructions: MA monitoring system</p> <p>Programme indications: Beneficiaries are responsible for collecting data from their projects' activities. Training providers must record participants registering for the training sessions.</p> <div style="border: 1px solid green; border-radius: 15px; padding: 10px; margin: 10px 0;">  <p>Participations in a joint training scheme are intended to be counted as registered participants who completed at least 60% of the training (based on total number of hours of training).</p> <p>Proof of attendance (participants records) is required in order for the participations to be considered.</p> <p>The information will include the national identification number of the person attending the training course, educational level, residence, employment status, if the case.</p> </div>
10	Time measurement achieved	<p>EC instructions: Contribution to this indicator will be measured upon project finalisation.</p>
11	Aggregation issues	<p>EC instructions: Double counting of participants in more than one training schemes organised by the same project should be excluded.</p> <p>Programme indications: Project partners are asked to provide a reporting tool, in the format provided by the Programme (in the annex), in which double entries can be easily searched, thus preventing potential double counting.</p> <p>Also, the project partners are asked to take necessary measures in order to be sure that a person did not participate in other identical training schemes organized within the same project, financed by Interreg VI-A Ro-Bg Programme.</p>
12	Reporting	<p>EC instructions: Rule 1: Reporting by specific objective Forecast values need to be provided by the beneficiaries, based on their financing contract / application form. Achieved values will be reported both cumulative to date and for the reporting period. (CPR Annex VII, Table 3).</p> <p>Programme indications: Projects will set up targets for this indicator in the application form. The targets should be reasonable and realistic, in direct connection with the Specific Objective of the Programme. Forecast values will be made by the Programme authorities based on the values proposed by each project, in the financing contract. Achieved values will be reported upon project finalization. Data must be uploaded to JEMS.</p>

13	References	<u>Commission Staff Working Document Performance, monitoring and evaluation of the European Regional Development Fund, the Cohesion Fund and the Just Transition Fund in 2021-2027</u>
14	Notes	<p>RCO85 is not counting the number of participants who finalised the joint training schemes - this is done through RCR81.</p> <div style="display: flex; align-items: center;">  <div style="border: 1px solid green; border-radius: 15px; padding: 10px; background-color: #e6f2e6;"> <p>Joint trainings for which the training organisers do not intend to record the confirmed completions / do not intend to issue certificates of completion are considered under the generic term of "joint actions" and are not considered for this indicator.</p> </div> </div>

RCR81 Completion of joint training schemes

Row ID	Field	Indicator metadata
1	Indicator code	RCR81
2	Indicator name	Completion of joint training schemes
3	Measurement unit	Participants
4	Type of indicator	Result
5	Policy objective	PO4. A more social and inclusive Europe implementing the European Pillar of Social Rights
6	Specific objective	<p>The indicator is used for monitoring interventions under SO 4.2 Improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including by fostering resilience for distance and on-line education and training, in respect to:</p> <ul style="list-style-type: none"> a) Joint actions aimed at enhancing cross-border collaboration in the field of education and training, to create new opportunities for cross-border mobility b) Joint actions aimed at increasing access and participation to education and training, including for disadvantaged groups (persons with low education levels and/or affected by poverty)
7	Definition concepts	<p>and EC instructions:</p> <p>The indicator counts the number of participants completing the joint trainings schemes organised by supported projects.</p> <div style="display: flex; align-items: center;">  <div style="border: 1px solid green; border-radius: 15px; padding: 10px; background-color: #e6f2e6;"> <p>Completion should be documented by the training organisers either through a record of the confirmed completions or by issuing certificates of completion of the training.</p> </div> </div> <p>The certificates of completion do not necessarily require a previous national certification process for the issuing organisation.</p>
9	Data collection	EC instructions:


		<p>MA monitoring system</p> <p>Programme indications:</p> <p>The project partners are responsible for collecting data from their projects' activities. Completion should be documented by the training organisers either through a record of the confirmed completions or by issuing certificates of completion of the training.</p>
10	Time measurement achieved	<p>EC instructions:</p> <p>Contribution to this indicator will be measured upon project finalisation.</p>
11	Aggregation issues	<p>EC instructions:</p> <p>Double counting of participants in more than one training schemes organised by the same project should be excluded.</p> <p>Programme indications:</p> <p>Project partners are asked to provide a reporting tool in which double entries can be easily searched, thus preventing potential double counting.</p>
12	Reporting	<p>EC instructions:</p> <p>Rule 1: Reporting by specific objective</p> <p>Forecast values need to be provided by the beneficiaries, based on their financing contract / application form.</p> <p>Achieved values will be reported both cumulative to date and for the reporting period. (CPR Annex VII, Table 3).</p> <p>Programme indications:</p> <p>Projects will set up targets for this indicator in the application form.</p> <p>The targets should be reasonable and realistic, in direct connection with the Specific Objective of the Programme.</p> <p>Forecast values will be made by the Programme authorities based on the values proposed by each project, in the financing contract.</p> <p>Achieved values will be reported upon project finalization.</p> <p>Data must be uploaded to JEMS.</p>
13	References	<p><u>Commission Staff Working Document <i>Performance, monitoring and evaluation of the European Regional Development Fund, the Cohesion Fund and the Just Transition Fund in 2021-2027</i></u></p>
14	Notes	<p>The value reported for RCR81 can be equal to or lower than the value of RCO85 (for example in case some participants withdraw after the training started or in case not all participants receive the final certification), but not higher.</p>

RCO87 Organizations cooperating across borders


Row ID	Field	Indicator metadata
1	Indicator code	RCO87
2	Indicator name	Organisations cooperating across borders
3	Measurement unit	Organisations
4	Type of indicator	Output
5	Policy objective(s)	PO4. A more social and inclusive Europe implementing the European Pillar of Social Rights
6	Specific objective	<p>The indicator is used for monitoring interventions under SO 4.2 Improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including by fostering resilience for distance and on-line education and training, in respect to:</p> <ul style="list-style-type: none"> • Joint actions aimed at enhancing cross-border collaboration in the field of education and training, to create new opportunities for cross-border mobility • Joint actions aimed at increasing access and participation to education and training, including for disadvantaged groups (persons with low education levels and/or affected by poverty) <p><i>The indicator is also used for monitoring all other SOs in the Programme.</i></p>
7	Definition concepts and	<p>EC instructions:</p> <p>The indicator counts the organisations cooperating formally in supported projects. The organisations counted in this indicator are the legal entities including project partners and associated organizations, as mentioned in the financing agreement of the application. Organisations cooperating formally in small projects (for instance under a Small Project Fund) are also counted.</p> <p>Programme indications:</p> <p>Partners who leave the project during the implementation are not counted for this indicator.</p> <p>Projects will set up targets for this indicator in the application form.</p> <p>The targets should be reasonable and realistic, in direct connection with the Specific Objective of the Programme.</p> <p>Please consider the fact that this indicator shall be reported by the end project implementation, considering the reporting timeframe.</p> <p>Data must be uploaded to JEMS.</p>
8	Data collection	<p>EC instructions:</p> <p>MA monitoring system</p> <p>Programme indications:</p> <p>The number of organisations cooperating across borders is equal to that of the project partners, including associate partners, which are involved in the implementation of the project.</p> <p>For project partners, the supporting document for this indicator is the financing contract.</p>

		For associate partners, the supporting document for this indicator is a formal cooperation agreement which shall be presented when submitting the project application.
9	Time measurement achieved	<p>EC instructions: Upon project finalisation</p> <p>Programme indications: Please note that if an organization will participate in more than one project financed through the Programme, either as partner or associate organization, it will only be counted once when aggregating the data for this indicator at Programme level. This will not influence targets and achievements at project level.</p> <p>Please consider the fact that this indicator shall be reported by project partners, by the end project implementation, considering the project implementation timetable.</p>
10	Aggregation issues	<p>EC instructions: At programme level, double counting should be avoided at the level of project partners and associated organizations.</p> <p>Programme indications: Please note that if an organization will participate in more than one project financed through the Programme, either as partner or associate organization, it will only be counted once when aggregating the data for this indicator at Programme level. This will not influence targets and achievements at project level.</p>
11	Reporting	<p>EC instructions: Forecast for selected projects and achieved values, both cumulative to date (CPR Annex VII, Table 3).</p> <p>Programme indications: Projects will set-up the targets for this indicator in the application form, based on the number of partners, including associate partners involved in the implementation.</p> <p>Data must be uploaded to JEMS.</p>
12	References	<u>Commission Staff Working Document Performance, monitoring and evaluation of the European Regional Development Fund, the Cohesion Fund and the Just Transition Fund in 2021-2027</u>
13	Notes	<p>Programme level details: The value of RCO87 should be larger or equal to that of RCR84 (the number of organizations collaborating after the project is completed cannot be larger than the number of organizations collaborating during project implementation).</p>

RCR84 Organizations cooperating across borders after project completion


Row ID	Field	Indicator metadata
1	Indicator code	RCR84
2	Indicator name	Organisations cooperating across borders after project completion
3	Measurement unit	Organisations
4	Type of indicator	Result
5	Policy objective(s)	PO4. A more social and inclusive Europe implementing the European Pillar of Social Rights
6	Specific objective	<p>The indicator is used for monitoring interventions under SO 4.2 Improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including by fostering resilience for distance and on-line education and training, in respect to:</p> <ul style="list-style-type: none"> • Joint actions aimed at enhancing cross-border collaboration in the field of education and training, to create new opportunities for cross-border mobility • Joint actions aimed at increasing access and participation to education and training, including for disadvantaged groups (persons with low education levels and/or affected by poverty) <p><i>The indicator is also used for monitoring all other SOs in the Programme.</i></p>
7	Definition concepts and	<p>EC instructions:</p> <p>The indicator counts the organisations cooperating across borders after the completion of the supported projects. The organisations are legal entities involved in project implementation, counted within RCO87.</p> <div style="display: flex; align-items: center; justify-content: center;">  <div style="border: 1px solid green; border-radius: 15px; padding: 10px; margin-left: 20px;"> <p>The cooperation concept should be interpreted as having a statement that the entities have a formal agreement to continue cooperation, after the end of the supported project.</p> </div> </div> <p>The cooperation agreements may be established during the implementation of the project or within one year after the project completion. The sustained cooperation does not have to cover the same topic as addressed by the completed project.</p> <p>Programme indications:</p> <p>In order to contribute to this result indicator, the cooperation should fulfil the following conditions:</p> <ul style="list-style-type: none"> - the cooperation is formalized under other form than the “partnership agreement” signed between the project partners with the purpose of implementing the project; - the purpose of the project is to develop and maintain the cooperation between structures over a longer period of time than the duration of the project; - not all the project partners need to sign the “cooperation agreement”, only a minimum of 2 partners. However, for this indicator, the cooperation proving document must be signed by at least two organizations participating in the project, one on each side of the border. The cross-

		border distribution of the organisations is mandatory regardless of the number of cooperating organisations.
8	Data collection	<p>EC instructions: MA monitoring system / Survey</p> <p>Programme indications: During project implementation or up to one year after project completion, the project partners, including associate partners, must ensure that a formal commitment (partnership agreement) is signed for continuing cooperation within a determined time frame. The lead partner will mention not only the number of unique organisations that concluded cooperation agreements, but it will also clearly identify these organisations. The indicator is considered achieved once project partners provide proof of the formal commitment to continue cooperation. The document should include a description of the intended cooperation and the intended timeframe. The partners must agree to provide the Programme authorities with details regarding the cooperation, for evaluation purposes. Once the formal commitment is validated by the Programme structures, the indicator is marked as achieved JEMS. Please consider the fact that this indicator shall be reported by project partners during the project implementation or up to one year after project completion. Data must be uploaded to JEMS.</p>
9	Time measurement achieved	<p>EC instructions: During project implementation / up to one year after project completion</p> <p>Programme indications: The number of organisations cooperating across borders after project completion will be counted one year after the date of the project finalisation.</p>
10	Aggregation issues	<p>EC instructions: At programme level, double counting will be avoided at the level of project partners and associated organizations.</p> <p>Programme indications: Please note that if an organization will agree to continue cooperation by signing more than one cooperation agreement, it will only be counted once when aggregating the data for this indicator at Programme level. This will not influence targets and achievements at project level.</p>
11	Reporting	<p>EC instructions: Forecast for selected projects and achieved values, both cumulative to date (CPR Annex VII, Table 6).</p> <p>Programme indications: Projects will set up targets for this indicator in the application form. The targets should be reasonable and realistic, in direct connection with the Specific Objective of the Programme. Data must be uploaded to JEMS.</p>
12	References	<u>Commission Staff Working Document Performance, monitoring and evaluation of the European Regional Development Fund, the Cohesion Fund and the Just Transition Fund in 2021-2027</u>

13	Notes	<p>The value reported for RCR84 can be equal to or lower than the value of RC087, but not higher.</p> <div style="display: flex; align-items: center; justify-content: center;">  <div style="border: 1px solid green; border-radius: 15px; padding: 10px; background-color: #e8f5e9;"> <p>Please note that if the cooperation agreement involves new organization, which have not contributed to the implementation of the project either as partners or associate partners, these organizations will not be taken into account for this indicator. However, the Programme authorities encourage the involvement of new organizations, as a means to promote sustainability and capitalization of results.</p> </div> </div>
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PSO4 Investments in education, training and life-long learning services

Row ID	Field	Indicator metadata
1	Indicator code	PSO4
2	Indicator name	Investments in education, training and life-long learning services
3	Measurement unit	Number of investments
4	Type of indicator	Output
5	Policy objective	PO4. A more social and inclusive Europe implementing the European Pillar of Social Rights
6	Specific objective	<p>The indicator is used for monitoring interventions under SO 4.2 Improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including by fostering resilience for distance and on-line education and training, in respect to:</p> <ul style="list-style-type: none"> a) Joint actions aimed at enhancing cross-border collaboration in the field of education and training, to create new opportunities for cross-border mobility. b) Joint actions aimed at increasing access and participation to education and training, including for disadvantaged groups (persons with low education levels and/or affected by poverty).
7	Definition concepts and	<p>Programme indications:</p> <p>The indicator counts the number of investments in education, training and life-long learning services. Investments are defined as an activity or a set of activities, incurring expenditure in relation to infrastructure and/or endowments in the field of improving access to and the quality of education, training and lifelong learning.</p>
8	Data collection	<p>Programme indications:</p> <p>Beneficiaries are responsible for collecting data from their projects' activities. Investments must be clearly defined by the Partners, from the onset of the project, in the application form, in term of activities to be performed and expenditure to be made (as a work package).</p>

		 <div style="border: 1px solid green; border-radius: 15px; padding: 10px; margin-top: 10px;"> <p>Please note that, in order to be counted by this indicator, the investment needs to be completed before the end of the project.</p> <p>As such, the indicator will be considered as achieved once all activities and expenditures comprised in the investment work package are completed.</p> </div> <p>The partners need to provide proof of completion. It is advisable that clear explanations be provided in the application form, in respect to how this will be achieved, for example in the form of reception or works or provision of equipment.</p> <p>Given the wide range of possible activities, supporting documents may vary. It is the responsibility of the project partner to provide sufficient and relevant proof to demonstrate the completion of the investment.</p> <p>Once the investment completion is validated by the Programme authorities, the indicator will mark it as achieved in the JEMS.</p>
9	Time measurement achieved	<p>Programme indications:</p> <p>At project completion</p>
10	Reporting	<p>Programme indications:</p> <p>Projects will set up targets for this indicator in the application form.</p> <p>The targets should be reasonable and realistic, in direct connection with the Specific Objective of the Programme.</p> <p>Forecast values will be made by the Programme authorities based on the values proposed by each project, in the financing contract.</p> <p>Achieved values will be reported upon project finalization.</p> <p>Data must be uploaded to JEMS.</p>

PSR4 Annual users of the supported investments in education, training and life-long learning services

Row ID	Field	Indicator metadata
1	Indicator code	PSR4
2	Indicator name	Annual users of the supported investments in education, training and life-long learning services
3	Measurement unit	users/year
4	Type of indicator	Result
5	Policy objective	PO4. A more social and inclusive Europe implementing the European Pillar of Social Rights
6	Specific objective	<p>The indicator is used for monitoring interventions under SO 4.2 Improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including by fostering resilience for distance and on-line education and training, in respect to:</p> <ul style="list-style-type: none"> • Joint actions aimed at enhancing cross-border collaboration in the field of education and training, to create new opportunities for cross-border mobility

		<ul style="list-style-type: none"> • Joint actions aimed at increasing access and participation to education and training, including for disadvantaged groups (persons with low education levels and/or affected by poverty)
7	Definition and concepts	<p>Programme indications:</p> <p>The indicator counts the number of pupils/students/persons benefiting from the supported investments in education, training and life-long learning services.</p> <p>In case of formal education (primary, secondary or tertiary studies, including VET), individuals are recorded once, per school year.</p> <p>In the case of non-formal education (ad-hoc and stand-alone training programs or education services) one individual can be counted more than once if using the investments multiple times, for different training programs/services. Virtual users (in the case of online trainings/courses) are also counted.</p>
8	Data collection	<p>Programme indications:</p> <p>Beneficiaries are responsible for collecting the data for this indicator, from their projects.</p> <p>Special measures need to be taken for quantification the number of users (within the meaning described above) and the reported data should be supported by evidence, either on paper or electronic. Data sources include: school records, attendance records.</p>
9	Time measurement achieved	<p>Programme indications:</p> <p>Contribution to this indicator is measured one year after the completion of investment in the supported project</p>
11	Reporting	<p>Programme indications:</p> <p>Projects will set up targets for this indicator in the application form.</p> <p>The targets should be reasonable and realistic, in direct connection with the Specific Objective of the Programme.</p> <p>Forecast values will be made by the Programme authorities based on the values proposed by each project, in the financing contract.</p> <p>Achieved values will be reported one year after project finalization.</p> <p>Data must be uploaded to JEMS.</p>