
“Initial Implementation Evaluation of the Demography, Qualifications and Inclusion Thematic Programme (PESSOAS2030)”

PROCEDURE

10/PESSOAS2030/2024

Executive Summary

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Evaluation Team

Coordination

Paulo Pedroso
António Oliveira das Neves

Executive Coordination

Tatiana Alves

Technical Team

António Ramos
Filipa Seiceira
Gisela Ferreira
Rui Godinho
Catarina Simão

Object, Scope, and Objectives of the Evaluation

The Demography, Qualifications and Inclusion Programme (DQIP), known as PESSOAS 2030, dedicated to demography, qualifications, and inclusion, is one of the four thematic programmes of Portugal 2030 and is aimed at the less developed regions of mainland Portugal (although some of its measures may include the Lisbon and Algarve regions).

The Programme's action strategy is based on seven priorities: 4A. More and better employment, work-life balance, and gender equality; 4B. More and better initial qualifications for growth; 4C. More and better adult (re)qualification for growth; 4D. More and better inclusion of people at risk or in situations of social exclusion; 4E. More and better access to quality services; 4F. Combating material deprivation; 4G Technical Assistance. These priorities are further broken down into seven specific objectives selected from the EU regulation establishing the ESF+.

The Initial Implementation Evaluation of the Demography, Qualifications and Inclusion Programme (PESSOAS 2030), within the scope of the PESSOAS 2030 Evaluation Plan (approved on 24 November 2023), and focusing on the analysis of relevance, coherence and operational efficiency criteria, consisted of a process evaluation of the initial implementation of the Programme and its operational conditions, with the objective of supporting the Managing Authority (MA) in improving its management, control, monitoring, evaluation and communication systems.

Methodology

The methodological framework developed focus on assessing the initial implementation process of the PESSOAS 2030 Programme, along with its operational conditions. This assessment addressed the relevance, coherence, and operational efficiency of the management model and internal organization. It also examined the support instruments created for management and implementation, such as regulations, selection criteria, design of calls for applications, the adoption of the simplified cost methodology, as well as the Programme's communication and evaluation strategy.

To achieve this, an integrated and pluralistic methodology was favoured, using various information-gathering techniques, such as document collection and analysis, interviews, workshops, and questionnaires, involving a wide group of stakeholders.

The interviews were conducted with the Steering Committee (SC), the Technical Secretaries (TS), and Coordinators of the MA Units of PESSOAS 20230 and the Agency for Development and Cohesion (AD&C). Additionally, a total of six workshops were held with representatives of the Intermediate Bodies (IBs), representatives of the Demographic, Qualification, and Inclusion Network (DQIN), entities representing beneficiary organizations (two sessions), MA technicians, and the ex-ante evaluation team and experts. Organizations with approved applications contributed in the questionnaire survey.

Response to the evaluation questions

Relevance

Q.A.1.1 To what extent have the recommendations from the ex-ante evaluation been incorporated, either during the evaluation process itself or after the start of the programme?

The programme has been designed in accordance with the programming theory outlined in the ex-ante evaluation, which means that it can be implemented in line with what was planned.

The ex-ante evaluation, an optional exercise, was requested during the preparation and negotiation of the Programme with the European Commission. It represents good practice and has affected the programming.

Overall, the recommendations made by the ex-ante evaluation team were either fully or partially incorporated into the programme, with only one exception. This particular recommendation was not incorporated, because national public policy was already progressing in that direction.

Coherence

Q.A.2.1 Is the organization of the PESSOAS 2030 Managing Authority (MA) (in terms of defining transversal and project management teams) relevant and does it meet its strategic and operational objectives, given the needs diagnosed?

The organization of the PESSOAS 2030 MA regarding the definition of transversal and project management teams is generally suitable, although some gaps are identified.

The SC has made an effort to merge the three Operational Programmes (OPs), incorporating lessons from the past. For example, the structure of the Legal Affairs, Control, and Litigation Unit was created based on the model of the Human Capital Operational Programme, while the structure of the Coordination and Organisational Development Unit was based on the model of the Social Inclusion and Employment Operational Programme.

The overall functional content assigned to the units aligns with the Programme's strategic and operational goals. However, the responsibilities associated with the Human Resources (RH) area are divided between two units, which is not appropriate from an organizational point of view and does not meet internal needs. This segmentation of functions requires intervention to prevent dysfunctions.

Q.A. 2.2 Is the coordination between the MA's transversal units/teams consistent with the requirements the programme has to meet?

Coordination between the MA's transversal units/teams is pertinent and partially meets the Programme's requirements.

There are both formal and informal articulation mechanisms and openness in the relationship between the SC and the technical structures. A difficulty identified at this stage of the Programme is the lack of formal space to discuss issues not related to operationalization.

The level of satisfaction with the articulation mechanisms differs.

The defined organizational model and the circuits described for the procedures coherently ensure the demands that the programme must respond to (cf. QA 2.1). However, in this start-up phase, operational obstacles were identified in terms of coordination between transversal units that do not stem from the organizational chart, but are driven by the use of a significant legacy of managers (in some cases with more than 20 years in the programmes), who are now assigned to different functions.

While it is understandable to leverage existing know-how during the transition, it is necessary to manage the relationship between the legacy and the currently designed structure. This requires an active strategy for transforming the distinct cultures of the previous OPs into a culture-orientated towards the new reality (PESSOAS 2030). This also involves improving coordination and articulation mechanisms, and the strengthening of formalized processes and coordination mechanisms (both horizontal and vertical)

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Q.A. 2.3 To what extent does the organization of the Programme promote coherence in the articulation: a) of funding measures between Programmes (thematic and regional); and, b) between the Programme and other actors, such as the Monitoring Committee or the PT2030 functional articulation networks (and, in particular, the Demography, Qualifications, and Inclusion, coordinated by this MA)? What could be improved?

The Programme's articulation processes with other Programmes are regulated and operational, with opportunities for improvement identified, particularly related to some internal and external constraints. These include the lack of technical articulation between the external and internal environments and the absence of an appropriate space for this purpose, and the lack of representation of the Project Management Units (PMU) in the functional network (DQIN). However, when specific topics are discussed, the Units are called upon to attend and share their experiences. The coherence of the articulation with the DQIN is promoted, although it has a greater potential than what is currently being utilized. This network, coordinated by the MA, can foster new approaches and has the potential to manage a more ambitious agenda, finding adequate space for the technical involvement of the PMUs. AD&C views this approach positively.

Operational Efficiency

Q.A. 3.1 Are the mobilized instruments [structuring documents such as the PDQI Specific Regulation, monitoring mechanisms, a system of indicators (common, programme and operation) and respective targets, Communication and Evaluation Plans, Calls for Applications published in the meantime, etc.] relevant to the programme's objectives and targets, to address the problems/challenges identified?

The Programme has the necessary structural documents for its operationalization, demonstrating a concern to make the necessary changes and revisions so that they can better respond to their intended functions.

The main limitations identified in the existing documents are related to the size and complexity of the Specific Regulations and the Calls for Applications. These documents are dense and use technical and legal language that is difficult to read. Therefore, there is a need for tools that can help clarify and support their application, both for beneficiary organizations and technicians.

The PESSOAS 2030 Strategic Communication Plan (SCP) is aligned with the Portugal 2030 Strategic Communication Plan, ensuring both external and internal coherence. From a formal point of view, the range of channels and instruments mobilized is broad in terms of the target audience segments to be involved. The SCP innovates in communication formats, exploring new combinations of communication initiatives, and allocates resources to segments that are less responsive to communication initiatives, such as unemployed beneficiaries, students, scholarship holders, young NEETs (Not currently engaged in Employment, Education, or Training), among others.

However, in its strategic execution, there have been issues in consolidating the first phase of the SCP (scheduled until June 2024), dedicated to launching and raising awareness of PESSOAS 2030. This phase has experienced significant delays due to the lack of financial autonomy of the Programme and its dependency on the General Secretariat of the Ministry of Labour, Solidarity and Social Security for public procurement processes. This has led to difficulties in launching higher investment procedures, some of which have not yet begun.

Q.A. 3.2 To what extent does the PESSOAS 2030 information system, in its current state, adapt to different needs?

The PESSOAS 2030 Information System (IS) is a back-office system, complementing to the Digital One-Stop Shop (Front Office) developed by AD&C. Although in the governance model of the funds, responsibilities are divided along these lines, the MAs were given the opportunity to use the BackOffice system developed by AD&C. AD&C developed a BackOffice (AG+), which PESSOAS 2030 decided not to use, given its financial size, technical diversity and focus on the specificities of each typology, considering that its own BackOffice offered greater management capacity and autonomy, a reasoning that is not followed by AD&C.

The development of new IS faces challenges related to timing, testing, and adaptation. The Digital One-Stop Shop is visually appealing and this is an advantage recognized by the beneficiaries, but it is widely acknowledged that there is significant room for improvement.

On a positive note, it can be concluded that there are formal moments of coordination with the relevant entities operating in the IS and these are considered important. The multi-level process (MA-AD&C/Intra Units MA) and the frequency of discussions on IS bottlenecks are valued.

In terms of the contribution and effectiveness of the PESSOAS 2030 IS as a management support tool for the Programme, the IS's response capacity to the needs of the technicians is still limited.

The dimension of interoperability between IS is still under development, but it has already shown positive results in terms of coordination with the Tax Authority and the Social Security Institute. However, issues remain in the transmission of information from other entities that are highly relevant to the programme, such as the IGEFE (SIGO), the Directorate-General for Education and Science Statistics and the National Institute for Rehabilitation, among others.

Another of the IS's aims is to ensure the dematerialization of processes throughout the life cycle of operations. This was to be expected from the start-up phase of the programme. However, there are still evidences of the use of paper in the first calls for applications.

One of the aspects causing the most concern for the ecosystem of technicians and managers at the AG is the current inability of the PESSOAS 2030 IS to systematize reliable financial data and respond to the monitoring and evaluation indicators system for PESSOAS 2030. This presents risks related to the programme's review in 2025 and the demonstration of evidence regarding the results of operations. This is particularly concerning in the context of reports to the European Commission.

Q.A. 3.3 Is the MA's human resources structure (team composition, both in terms of number and qualifications to carry out the necessary functions) adequate for the demands the programme has to meet? Does it allow for efficiency gains?

The HR structure is adequate. However, it has some limitations, namely: a motivational and organizational environment that hampers efficiency levels; a qualified structure, but with a legacy that influences siloed work.

This structure was designed with the continuation of the previous structure in mind. Optimising its suitability for the Programme's needs means reassessing it in the light of the challenges it poses. On the other hand, it is also essential to provide training to improve the understanding of the policy and programme objectives, particularly in the area of Demography, in order to meet the demands that the Programme must address.

Although the human resources framework has not been filled - a current and future issue for the MA - this structure is robust and experienced, having already experienced the start-up of processes (many of them over two previous EU funding periods).

The incorporation of new human resources and the replacement of those leaving is a serious management issue. Therefore, the organization must address the need to manage turnover within the staffing framework.

Most Units have not completed the projected staffing levels based on the planned allocation, and some identify a lack of resources, which could pose a challenge during the full implementation phase of the Programme.

Q.A. 3.4 Are the delegation contracts established with the designated Intermediate Bodies adequate to meet the PESSOAS 2030 objectives and targets, particularly in terms of the operational adequacy of their resources in relation to the delegated competences?

The delegation contracts established with the designated Intermediate Bodies are appropriate to the objectives and goals of PESSOAS 2030.

The resources allocated are appropriate to the delegated competencies, with functions and responsibilities being formalized and clearly outlined in the Procedures Manual.

The organic relationship in the contracting and supervision of processes is adequate, and the relationship between the PMUs and the structures of the IBs is daily.

The fatigue of the human resources assigned to the structures of the IBs, the workload and pressure of execution, which is characteristic of EU funds, and the lack of career recognition, compared to the other resources of the institutions (who do not face the same pressure) are some of the challenges highlighted by the IBs in the operational action and execution of the tasks delegated to the human resources.

On the other hand, the difficulties experienced by the IBs in implementing their respective competencies include constant changes to the information system that do not meet the specific needs of target groups, the high level of scrutiny in application analysis, payments, and closing (especially when there are TOs with simultaneous processes), the bureaucratic burden of the procedures and the profile of the technicians themselves (who tend to be older).

Q.A. 3.5 Are the selection criteria for the various types of operation relevant to the different profiles of actions eligible under them and do they fulfil their purpose of assessing the merit of the operations?

Defining the selection criteria for each type of operation was a lengthy process, especially during the initial phase of the programme, requiring strong coordination with AD&C, to define a set of first-level criteria common to the various Portugal 2030 programmes, as well as with the European Commission, given the need for consultation and response to their contributions before submitting the Selection Criteria for approval by the Monitoring Committee.

The MA's concern is to adapt the selection criteria to the different types of operations, with particular emphasis on competitive operations, where these criteria play a decisive role in project approval. However, it is acknowledged that this is not an easy task, as these operations are predominantly intangible in nature and do not produce immediate results, making it difficult to quantify merit and quality through clear and objective indicators.

In this context, the existence of explanatory notes on the interpretation of each subcriterion is considered essential for better understanding and clarification of the analysis process. This is seen as crucial both for beneficiaries to better prepare their applications and for technicians to assess the merit of projects more consistently. There is also a recognized need to deepen this work both within each PMU and across PMUs.

In general, the selection criteria are considered adequate and fulfil their purpose of assessing the merit of the operations. The main limitations identified are related to the lack of a criterion/subcriterion that allows for positive discrimination of territories where implementation is known to be difficult, namely low-density territories and territories with a high concentration of vulnerabilities to be covered.

Q.A. 3.6 Is the adoption of a simplified cost methodology in the types of intervention that take up this option pertinent and does it contribute to the efficiency of PESSOAS 2030?

The adoption of simplified costs in the types of operations that choose this option is relevant and all indications suggest it will contribute to the efficiency of PESSOAS 2030. However, it is necessary to address the identified weaknesses and threats. At this stage of the Programme, there are still few types of operations using simplified cost methodologies that are in the payment request phase, so a detailed analysis of their application is not yet possible.

PESSOAS 2030 is one of the operational programmes with the highest number of types of operations using simplified costs. By September 2024, 45.5% of the total funding amount (national and European Union) is allocated to reimbursements in the simplified costs, in accordance with Article 94 of the Common Provisions Regulation 2021-2027 (higher-level Simplified Cost Options – SCO).

The beneficiary organizations surveyed give a positive evaluation of the adoption of simplified costs and their contribution to simplification, focusing on results, and speeding up procedures, although they also highlight some weaknesses, mainly related to the amounts considered and their potential mismatch (insufficiency relative to the nature of the projects).

Conclusions and recommendations

Caption:

	No intervention required
	Specific interventions
	Structural interventions

Relevance

Q.A.1.1 To what extent have the recommendations from the ex-ante evaluation been incorporated, either during the evaluation process itself or after the start of the programme?

Conclusions

The iterative nature of the ex-ante evaluation allowed for several changes in the programming process, which, although not fully captured in the exercise, allowed for improvements in the Programme right from the programming phase.

Overall, there was a concern about incorporating the evaluation's recommendations, but the evaluation pointed to innovation paths that were not followed.

Recommendations

Densify the Demographic and Inclusion dimensions, particularly in the design of the typologies not yet launched.

Assess the relevance of the ex-ante evaluation recommendations that were not incorporated into the Programme as part of the OP evaluations.

Consistency

Q.A.2.1 Is the organization of the PESSOAS 2030 Managing Authority (MA) (in terms of defining transversal and project management teams) relevant and does it meet its strategic and operational objectives, given the needs diagnosed?

Conclusions

The organization of the MA is relevant and partially meets its strategic and operational objectives.

The responsibilities associated with the Human Resources area are distributed between two units and they identify that they do not have adequate resources with the specialized knowledge required for this area.

Recommendations

Redefine the location of the duties and organizational content of the Human Resources area, currently distributed between the Coordination and Organisational Development Unit, Financial and Institutional Management Unit, and Closure Coordination 1, in a single Unit. Two possible alternatives are proposed:

a) Creation of a dedicated Unit (People Management Unit in PESSOAS 2030);

OR

b) Assigning the responsibilities to the Coordination and Organisational Development Unit, with a specific Coordinator.

Q.A. 2.2 Is the coordination between the MA's transversal units/teams consistent with the requirements the programme has to meet?

Conclusions

Coordination between the MA's transversal units/teams is relevant and partially meets the requirements the programme has to meet.

At this start-up phase, there are obstacles in terms of coherence between transversal units that do not stem from the organizational chart, but from the way it works, motivated by a significant legacy of leaders (in some cases with more than 20 years in programmes), which leads to 'overstepping' the organic dimensions and undervaluing the description of systems. It is necessary to manage and dilute the legacy through an active strategy of transforming the organizational cultures of previous programs into a unique culture and identity for PESSOAS 2030.

Recommendations

Reinforce the formalization of workflows by revisiting the organizational content of each unit, formalizing process flows, and ensuring their implementation. This reinforcement is an opportunity to review relevant areas of articulation.

Adopt an organizational culture management strategy with improved horizontal and vertical coordination mechanisms.

Strengthen coordination mechanisms:

- Create spaces for leaders to discuss non-operational issues;
- Create non-formal spaces to strengthen integration;
- Evaluate physical reception conditions and consider spaces that generate informal contacts;
- Evaluate the work regime;
- Reinforcing measures to reconcile work and family life.

Q.A. 2.3 To what extent does the organization of the Programme promote coherence in the articulation: a) of funding measures between Programmes (thematic and regional); and, b) between the Programme and other actors, such as the Monitoring Committee or the PT2030 functional articulation networks (and, in particular, the Demography, Qualifications, and Inclusion, coordinated by this MA)? What could be improved?

Conclusions

The Programme's coordination processes with other Programmes and Networks are regulated and operational, and opportunities for improvement have been identified regarding some internal and external constraints.

There is a lack of technical coordination between the external and internal environment (and a suitable space for this purpose). The Committee or the Annual Meetings (a body where the units are present, even as technical support) are spaces for presenting results and 'accountability', not for technical debate. In the functional networks, the PMUs have no presence (and have thus far primarily addressed coordination and calls for applications).

In the absence of a formal space, the legacy of the leaders addresses issues in the informal domain, subverting the logic of the organizational structure and the vertical and horizontal coordination of the programme.

The DQIN network, coordinated by the MA, can encourage other approaches and manage a more ambitious agenda. AD&C itself sees this approach as positive.

Recommendations

Review the internal design and validation flow of the calls for applications (involving transversal units and project management units), ensuring mechanisms for reporting their dynamics.

Promote thematic meetings with the ecosystem of stakeholders to coordinate technical measures.

Take on the coordinating of the DQIN to define new articulation content for the Demography, Qualifications, and Inclusion Network.

Expand participation to include other partners in the Demography Network (such as Technical Secretaries of the PMUs, for example) depending on the nature of the topics.

Operational Efficiency

Q.A. 3.1 Are the mobilized instruments [structuring documents such as the PDQI Specific Regulation, monitoring mechanisms, a system of indicators (common, programme and operation) and respective targets, Communication and Evaluation Plans, Calls for Applications published in the meantime, etc.] relevant to the programme's objectives and targets, to address the problems/challenges identified?

Conclusions

The PESSOAS2030 Programme has a set of structuring documents necessary for its implementation.

The main limitations identified in the documents are primarily related to their complexity and sometimes nuclear language, and the lack of supporting documents/guidelines to help simplify, clarify and standardize understanding and procedures, both for technicians and beneficiary entities.

The MA is dependent on AD&C for the provision of harmonized templates for the various funds (application forms, reimbursement requests, amendment requests, physical execution, etc.), with a critical perspective regarding their adequacy in relation to the specificities of the support granted by the Programme.

This dependency also limits the Programme's ability to define procedures and draw up supporting instruments.

The analysis of its instruments highlights that the SCP includes relevant elements to enhance the results of communication actions and innovate communication formats by exploring new combinations of communication initiatives. However, delays in its implementation have been observed, mainly due to public procurement processes. Additionally, there is a significant number of beneficiary entities that have not received information about PESSOAS 2030 but would like to.

Recommendations

Where applicable, draw up and make available complementary documentation with guidelines/manuals/checklists for both technicians and beneficiary organizations.

Making adjustments to existing documents to make them easier to read, e.g. having a consolidated version of the specific regulations, introducing a table of contents, numbering chapters and headings in the calls for applications.

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- To enhance the implementation of the SCP and the results among beneficiaries, namely by:
- Reinforce the promotion of the instruments produced by the MA (social networks, videos and newsletter) to achieve greater penetration in terms of awareness and utilization by the beneficiaries.
 - Reinforcing the delivery of information about PESSOAS 2030 using the email addresses of beneficiaries and potential beneficiaries.
 - Reinforce the provision of information to beneficiaries and potential beneficiaries on sharing good practices, specific legislation, a newsletter, a list of supported projects, data on the implementation of the PO and reports and publications.
 - Increase the number of online clarification sessions for beneficiaries and potential beneficiaries (support in the application process).
 - Reinforce the availability of a call centre for clarification activities with beneficiaries.
 - Reinforce the actions and extended publicity sessions prior to the opening of applications.

Q.A. 3.2 To what extent does the PESSOAS 2030 information system, in its current state, adapt to different needs?
Conclusions
The SI is considered visually appealing, which is a widely recognized advantage. However, it is also widely acknowledged that there is significant room for improvement in the system. The construction of a new SI presents foreseeable challenges such as timeliness, testing, and adaptation. The Programme's stakeholder system identifies specific problems and risks in the short and medium term, both at the digital one-stop shop and in the PESSOAS 2030 IS.
There are problems, which can originate in the FrontOffice, the BackOffice, or both, which have repercussions on the effectiveness of SI PESSOAS 2030 as a management support tool for the Programme. The capacity of the IS to respond to the needs of technicians is limited.
Insufficient internal resources in the Information Systems and Innovation Management Unit.
Need to define requirements for the construction of a GA BackOffice system that requires input and coordination with resources from project management units.
A high level of concern about risks associated with key aspects of the programme's management, particularly in terms of physical implementation.
Weak capacity to respond to analysis needs, with entropy and not functioning as a resource to support the life cycle of operations.
Risk of losing the system's ability to respond to the Programme's operational management and monitoring needs.
The dimension of interoperability between IS is being developed and is already showing good results in the case of liaison with Tax Authority and the Social Security Institute. However, there are problems in transmitting information from other relevant organizations such as the IGEFE (SIGO), the Directorate-General for Education and Science Statistics and the National Institute for Rehabilitation.
Recommendations
Reinforce the team in the Information Systems and Innovation Management Unit with technicians with operational experience in the Unit's technical work profile, preferably with experience in European Funds.
Create a task force for SI PESSOAS2030 to ensure its capacity to respond to the various functionalities it must include.
Develop new functionalities in SI PESSOAS 2030 and simultaneously improve existing functionalities.
Stabilizing the Information System model to serve the specificities of the PT2030 programmes.
Improving the ability to anticipate the IS's operational and technical problems rather than adopting a reactive approach.
Strengthen dialogue and coordination with AD&C in resolving technical and governance issues, naturally involving technology partners.
Ensure interoperability between IS.

Q.A. 3.3 Is the MA's human resources structure (team composition, both in terms of number and qualifications to carry out the necessary functions) adequate for the demands the programme has to meet? Does it allow for efficiency gains?
Conclusions
The HR structure is adequate, robust and experienced, having already gone through the launch of programmes. However, it does have some limitations, namely: a psychological and organisational environment that is detrimental to efficiency levels; a qualified structure, but with a legacy that influences siloed work.
The incorporation of new human resources and the replacement of those who leave is a major management problem. The organisation must therefore reflect the need to deal with staff turnover.

Most units' staffing levels do not meet the planned allocation and some units identify a lack of resources, which could be a challenge to the Programme's smooth performance at full capacity.

Recommendations

Conduct a workload analysis (identified from functional content) in accordance with the prescribed procedures and reassess the necessary HR.

Create mechanisms for sharing human resources between units. There are tasks with a common matrix between units, and flexibility in articulation can be created.

Develop a contingency plan that mobilizes other technicians for the analysis of reimbursements.

Implement Artificial Intelligence (AI) mechanisms to ensure linear tasks (e.g. ensuring the eligibility of applications).

Q.A. 3.4 Are the delegation contracts established with the designated Intermediate Bodies adequate to meet the PESSOAS 2030 objectives and targets, particularly in terms of the operational adequacy of their resources in relation to the delegated competences?

Conclusions

The delegation contracts established with the designated Intermediate Bodies are adequate to meet the objectives and targets of PESSOAS 2030.

The allocated resources are adequate and experienced to handle the delegated competencies.

The organizational and 'day-to-day' relationship is adequate.

There has been some fatigue among the human resources assigned to the Intermediate Bodies structures and difficulties in implementing competencies associated with the high bureaucratic burden, changes arising from Community Frameworks constant changes in information systems and the maturation of the current IS.

Recommendations

Disseminate contract information within PESSOAS to the stakeholders involved (the PMUs have not received the contract for the delegations they operate daily).

Q.A. 3.5 Are the selection criteria for the various types of operation relevant to the different profiles of actions eligible under them and do they fulfil their purpose of assessing the merit of the operations?

Conclusions

The selection criteria, in general, are appropriate for the specificities of each TO and fulfil their purpose of merit evaluation. However, given the intangible nature of the operations to be supported, it is not always clear how they will be assessed.

Recommendations

Provide technicians and beneficiary organizations with explanatory notes on how to interpret each subcriterion.

Consider using a criterion/subcriterion that would, in some way, positively discriminate territories where implementation is more challenging.

Q.A. 3.6 Is the adoption of a simplified cost methodology in the types of intervention that take up this option pertinent and does it contribute to the efficiency of PESSOAS 2030?

Conclusions

Extensive use of simplified cost methodologies in the programme, focusing on the use of unit costs and flat rates in various TO, with professional courses, internships, and apprenticeships standing out as the operations with the highest amounts to be reimbursed using this methodology.

Inadequacies were detected in the information system for reporting and analysing payment requests with simplified costs and the lack of explicit guidelines on how controls and verifications will be carried out.

Recommendations

Adapt the Information System for payment requests with simplified costs.

Adopt verification and auditing procedures for simplified costs that focus on results.

Develop training courses for MA/IB technicians and beneficiary organizations on simplified costs.

Monitor the implementation of simplified costs to assess whether the amounts funded are adequate in relation to the actual costs incurred by the organizations to develop the projects.

Continue to invest in the use of simplified cost methodologies, extending them to more TO.