

ACQUISITION OF SERVICES FOR THE EVALUATION OF THE OPERATIONALIZATION OF THE PESSOAS 2030

PROGRAM PROCEDURE 24/PESSOAS 2030/2024

EXECUTIVE SUMMARY



MAY 2025

EVALUATION TECHNICAL TEAM

The following table presents the composition of the technical team and the division of labour and responsibilities that organize it.

TEAM MEMBER	ROLES PERFORMED
António Manuel Figueiredo	Coordination of the evaluation study; participation in the development of the Theory of Change (ToC) and critical analysis of available materials; involvement in the preparation of case studies; drafting of conclusions and recommendations.
Filipa Barreira	Supervision of the inquiry process (questionnaire surveys) and participation in addressing evaluation questions; participation in drafting conclusions and recommendations.
Maria Álvares	Critical analysis of the Theory of Action (ToA) and available programming theories (PT); Co-responsible with the coordination of the work for the design and development of case studies and focus groups; supervision of interview work; participation in addressing evaluation questions; participation in drafting conclusions and recommendations.
Patrícia Amaral	Participation in conducting case studies and interviews; participation in addressing evaluation questions.
Pedro Quintela	Participation in the methodological design and implementation of the work; participation in conducting case studies and focus groups; participation in addressing evaluation questions; participation in drafting conclusions and recommendations.
Artur Costa	Quality assurance of the study.
Carlos Fontes	Technical and administrative support in conducting and processing inquiry processes

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1. OBJECT, SCOPE AND OBJECTIVES OF THE EVALUATION

The PESSOAS 2030 Program is an integrated and strategic response to the European Union's Strategic Objective 4 – "A more social and inclusive Europe, through the implementation of the European Pillar of Social Rights". Structured around seven strategic priorities, ranging from promoting more and better employment to combating material deprivation, the Program is materialised in 56 types of operations (TO), covering a wide range of interventions. This approach reflects an evolution compared to the previous programming period, by unifying, in a single body of programming, areas previously distributed among three Operational Programs (POCH – Human Capital Operational Program, POISE – Social Inclusion and Employment Operational Program and POAPMC – Operational Program to Support the Most Deprived People).

The evaluation of the operationalization of PESSOAS 2030 assumes a strategic role by providing elements that can support the intermediate review of the Program and its possible reprogramming.

The approach adopted integrates the constraints of the Program's implementation stage, allowing informed adjustments and a more responsive execution.

Regarding the context in which this evaluation took place, it is not substantially different from the one in which the Program was designed, even though the political cycle is distinct. However, knowledge about matters related to the strategic priorities of the Program now includes new elements of analysis and evidence, which have implications for the monitoring of the Program and its implementation.

Another aspect of contextualization that this evaluation of operationalization cannot overlook is the existence of Operation Typologies (OT) that have not yet been the subject of published calls, and others that have not yet shown execution in the Program's information. The initial implementation of PESSOAS 2030 was marked by the implementation of the Extraordinary Anticipation Mechanism (MEA), which ensured not only continuity with intervention matters of the Programs accommodated by PESSOAS 2030 but fundamentally an acceptable level of initial execution. The incidence of OTs not yet initiated is not uniform across all strategic priorities, with priorities related to social inclusion revealing a higher incidence of this evidence of later implementation start.

The definition of the Evaluation Questions (EQ) to which the evaluation team must respond allows for an understanding of the evaluation's objectives. These EQs involve matters of relevance, internal and external coherence of the programming, operational efficiency, effectiveness, and European added value. The criteria by which the programming's operationalization is evaluated are sufficiently explicit to understand the objectives that the evaluation aims to achieve.

The evaluation of operationalization of PESSOAS 2030 has been characterized by a constant adaptation to the reality of the Program's implementation stage and the execution limitations it presented. It should be noted, however, that some of the execution limitations mentioned are not necessarily due to actual execution difficulties, but rather to problems with generating updated information about it. In other words, there is more execution than that described by the indicators in question, although it is not possible to quantify this deviation.

The adopted methodology reflects a flexible approach guided by the plausibility analysis of the Theory of Change (ToC), applied more in-depth to some Evaluation Questions (EQ). The information triangulation model, designed to maximize the use of available sources, was adjusted to respond to current circumstances, notably the scarcity of evidence for a significant number of Operation Typologies (OT), especially the more innovative ones, although this does not imply the absence of innovations in the so-called continuity programming. In this context, the evaluation was based on robust document analysis, inquiries to beneficiary entities, and a comprehensive set of interviews with structures from the Managing Authority (MA), Intermediate Bodies (IB), and the Beneficiary Responsible for the Implementation of Public Policy (BRIPP), as well as focus groups with experts in the intervention areas of the Program. The comparative analysis that was possible to carry out between Case Studies (CS) related to Operations of Strategic Interest (OSI) with some continuity (professional internships,

professional courses, and Qualifica Centers) and OT with more innovative dimensions (namely, National Centers for Reception and Integration of Migrants and Capacity Building of Social Economy Partners) added even greater robustness of evidence to this evaluation study.

2. METHODOLOGY

The study's methodological approach followed a theory-based evaluation model (TbE), within which the evaluation team conducted a critical analysis of the Theory of Action (ToA) and the programming theories (PT) for the main strategic priorities of the PESSOAS 2030 Program. This critical analysis focused mainly on attempting to simplify the formulation of intermediate outcomes, whose readability becomes somewhat reduced with such a diversity of Operation Typologies (OT), although at the time of preparing this evaluation there is still a wide range of OTs that have not yet been possible to initiate.

Operation Typologies	Number	% of ESF+ Financial Allocation Involved
With approved operations, but without execution	11	18,30
Without submitted and/or approved operations	27	16,53
Of which, without published calls	19	2,94
Of which, with published calls	8	13,59

Source: Financial information of the Program reported as of 31 December 2024

In response to the Evaluation Questions (EQ), a set of methods and techniques were employed to ensure comprehensive and rigorous information gathering and analysis. A survey was conducted targeting entities with both approved and non-approved operations under PESSOAS 2030, capturing information on the experiences and perceptions of beneficiaries. Within the scope of the Case Studies (CS), additional questionnaire surveys were conducted, for example, with Qualifica Centers and Intermunicipal Communities involved in the coordination processes for Professional Courses. An in-depth document analysis was carried out, focusing on existing research about the Program's Operation Typologies (OT), contributing to the evaluation of the plausibility of the Theory of Change (ToC). Additionally, four focus groups were organized with experts from different intervention areas of the Program, ensuring detailed and informed discussions. In cases where it was not possible to conduct focus groups, additional interviews were used to ensure comprehensive coverage of relevant perspectives. Focusing on program management, interviews were conducted with five Intermediate Bodies (IB) and the Managing Authority (MA), as well as a focus group with the Management Units and another with the Transversal Units of the Program. This methodological combination ensured the diversity and rigor necessary for formulating conclusions and recommendations.

The implementation stage of the Program, with 18 Operation Typologies (OT) still without published calls but representing only about 3% of the ESF+ allocation, and 11 OTs with approved applications but without execution, required some analytical precautions. However, these did not substantially hinder the analysis of the plausibility of the Theory of Change (ToC). Additionally, in multiple OTs, particularly those involving learning processes, the measure of the quality of these operations goes far beyond the result indicators established by the Program. This requires a temporal deferment of analysis that the Program cannot develop and which this evaluation also cannot overcome. PESSOAS 2030 has already launched or scheduled new evaluation studies that can address some of these questions, such as the Evaluation of Curricular Flexibility and Qualifica Centers, which have already been initiated. There is evidence that a major evaluation of the Professional Courses system will also be launched. In any case, according to the evaluation, the so-called continuity programming will require greater attention not only to issues of achievement and results but also to the improvement of the quality of processes.

3. RESPONSES TO EVALUATION QUESTIONS

To what extent are the Program's structure of objectives and typologies addressing the diagnosed needs of the target groups the Program aims to serve? (relevance)

The PESSOAS 2030 presents a consistent response to the main public policy needs and structural challenges of Portugal, demonstrating relevance in the primary intervention domains of the Program: qualification of youth and adults, combating inequalities in labour market integration, addressing poverty and social exclusion, and inequalities in access to public services. However, the updated diagnosis shows that, despite observed improvements in flow variables, the inertia of existing qualification deficits still presents in Portuguese society, particularly severe concerning adults, persistent socioeconomic inequalities, labour precariousness, and digital exclusion, justify the continued intervention of the Program. As elements of the diagnostic update warranting increased attention from the Program, the evaluation identified the growing significance of issues related to immigration, with challenges in terms of reception and integration, the expansion of intervention domains concerning awareness and support for victims (surpassing the intervention domains defined by the Program: victims of domestic violence, gender-based violence, and victims of human trafficking), and the need for a more integrated and coordinated response to the challenge of demographic decline. The impact of the Recovery and Resilience Plan (PRR) over an extended period of the PESSOAS 2030's validity has intensified the Program's coordination needs with other ESF+ interventions, particularly with Regional Programs and the need for more effective territorialization of the Program itself. Similarly, it is important to strengthen the already effective and positive articulation with the Asylum, Migration, and Integration Fund (FAMI 2030) on matters specifically related to the reception and integration of migrants, which assumes relevant levels of fluidity and operability, especially within the adaptation to the creation of the Agency for Integration, Migration, and Asylum (AIMA) and the coordination among the three existing National Centres for Reception and Integration of Migrants (CNAIM) and the Local Centres for Reception and Integration of Migrants (CLAIM). The role played by PESSOAS 2030 in supporting intercultural mediators present in the CNAIM and in building the technical capacities of CNAIM structures and AIMA itself should be highlighted. The same should be affirmed regarding the Program's role in supporting the capacity building of social economy partners (Operation Typology "Capacity Building of Social Economy Partners"), more specifically those represented in the National Council for the Social Economy (CNES), addressing vulnerabilities identified in the previous programming cycle, with a focus on institutional capacity, coordination and representation, digitalization, communication, and knowledge production.

Do the interventions planned in the Program show coherence among themselves (in programmatic terms and in practice) to achieve the Program's objectives? Is the coordinated use of different existing funding instruments for interventions in the same public policy areas that the Program finances being ensured? (Internal coherence)

The Specific Objectives (SO) of PESSOAS 2030, formulated with broad scope and multiple foci that result from a previously established European-level framework, tend to challenge the internal coherence of the Program. Each SO covers diverse areas and provides examples of responses, and this lack of specificity and thematic overlap increases the complexity in the articulation between measures and the definition of priorities. This approach, although necessary to encompass multiple dimensions of public policies and guide programming in each Member State, undermines readability and challenges the monitoring and evaluation of the achievement of objectives.

Despite this, PESSOAS 2030 demonstrates significant overall coherence between its strategic objectives and typologies, showing an effort to articulate interventions in the domains of employment, social inclusion, and education, albeit with the trade-off of a high multiplicity of Operation Typologies (OT), which may raise issues regarding the readability of this coherence. However, there are variations in the connection between the specific objectives of each priority and the practical articulation of operational measures. Although measures such as Professional Internships and Technological Specialization Courses

are aligned with the programmatic objectives, in the programming exercise, the detailing is limited, and it is unclear how alignment with emerging sectors, territorial coverage, and coordination among stakeholders will be processed.

Are there complementarities and/or synergies and/or overlaps between the Program's interventions and other interventions addressing the same constraints or territories (particularly the relationship between Thematic and Regional Programs and between these and the Recovery and Resilience Plan (PRR) and other regional/sectoral policy instruments)? (External coherence)

The analysis of the PESSOAS 2030 external coherence reveals a high strategic alignment with the main instrument for operationalizing the national strategy of the Recovery and Resilience Plan (PRR), and with long-term strategies, including the Decent Work Agenda, the National Strategy for Combating Poverty (ENCP), the National Strategy for the Inclusion of People with Disabilities (ENIPD), the Action Plan for the Child Guarantee (PAGPI), and the National Strategy for Equality and Non-Discrimination (Portugal + Igual). These instruments guide the implementation of public policies in crucial areas for the country's sustainable development and social cohesion.

The Case Study (CS) on the practice of the National Centres for Reception and Integration of Migrants (CNAIM) shows that support for the immigrant population in Portugal can be considered a successful case of creating synergies, particularly between PESSOAS 2030 and the Asylum, Migration, and Integration Fund (FAMI 2030), which benefits from the delineation of opportunely established interventions, but is more than that. The articulation with the Regional Programs is much more limited, as only the Algarve Regional Program covers operational expenses of the CNAIM located in this territory. The aforementioned articulation is also institutional: with AIMA (managing body of the CNAIM) and IEFP (with a decisive role in the training offer of Portuguese for Foreigners, for example), in addition to AIMA integrating the Monitoring Committees of FAMI 2030 and PESSOAS 2030.

PESSOAS 2030 and the PRR act as complementary instruments of financing and operationalization, translating the strategic objectives defined in these agendas into concrete actions for complementary time periods. This complementarity is visible in areas such as qualification, social inclusion, and digital transition. However, the analysis identifies significant challenges in terms of operational articulation, especially in territories where both programs finance local interventions. Effective coordination is crucial to avoid redundancies and maximize synergies, particularly in capacity-building and active inclusion measures.

Concerning national strategies, PESSOAS 2030 complements the Decent Work Agenda by financing qualification and active inclusion initiatives that operationalize legislative measures to reduce precariousness and promote equality in the labour market. Within the scope of ENIPD, the program stands out for operationalizing the Support Model for Independent Living (MAVI), contributing to the autonomy of people with disabilities, while ENIPD provides the strategic framework. In relation to Portugal + Igual, the convergence in gender equality goals and the deconstruction of professional stereotypes is evident but requires coordination to avoid overlaps in awareness and capacity-building campaigns.

Finally, the relationship with the Regional Programs demonstrates the need for territorial articulation to align national goals with local specificities. The inclusion of integrated planning and monitoring platforms could improve complementarity between programming levels, ensuring a more effective and tailored approach to the needs of each region, particularly by capitalizing on the operation of the Functional Articulation Network of Human Capital.

In summary, the external coherence of PESSOAS 2030 is potentially robust but requires reinforcement in coordination and institutional articulation to maximize the impact of interventions, ensuring that they effectively respond to national and regional priorities.

Have the administrative procedures throughout the project lifecycle, including the Information System, proven to be effective and efficient? (operational efficiency)

The answer to this Evaluation Question (EQ) is conditioned by the existence of a large number of Operation Typologies (TO) with non-competitive access to support. It is also marked by the insufficiencies identified by a large majority of stakeholders regarding the front-office of the PT2030 Information System (IS), where the Program is integrated, with difficulties in the insertion of physical execution at the forefront of these insufficiencies. The TOs related to the requalification of adults, particularly the Certified Modular Training, assume a differentiated relevance in this matter, given the high demand expressed and the also high number of non-approved operations.

In terms of satisfaction of the beneficiary entities, the percentage of promoters who evaluate the procedure with the two highest levels of satisfaction is quite high: Clarity of the calls (77.7%); Clarity of the information provided and the eligibility criteria of the operations (70.4%); Clarity of the selection criteria (63.8%); Adequacy of the analysis of the assigned merit (67.7%); and the text of the calls and forms allowed guiding the project design (67.8%). The evaluation of the administrative procedures of the Program is less positive, with the previous percentages presenting the following values: Clarity of the calls (59.5%); Clarity of the information provided (42.9%) and the eligibility criteria of the operations (50%); Adequacy of the analysis of the assigned merit (23.8%); and the text of the calls and forms allowed guiding the project design (54.8%). Nevertheless, it is worth noting the significant valuation in the Simplicity of the application process (45.2%).

Compared to the results of the PESSOAS 2030 Launch Evaluation, the aforementioned evaluation considered that "within the scope of the contribution and effectiveness of the PESSOAS 2030 IS as an instrument supporting the management of the Program, the response capacity of the IS to the needs of the technicians is still limited." The interoperability issues noted by the said evaluation as still in an initial phase of implementation have since developed. Incorporating all the pronouncements of the Managing Authority (MA) and the technical support structures for the management of the Program and the Intermediate Organizations (IO), it is concluded that the front-office model in a single counter regime and combination with its own back-office system is considered a source of problems that penalize the operational efficiency of the Program. The limitations introduced by the difficulty of the former to provide data on the physical execution of the Program, forcing contingency solutions, stand out among the registered operational anomalies. The successive adaptations registered in the front-office system and the implications that this entails in terms of adaptations of the back-office system of the PESSOAS 2030 IS are also pointed out as transaction costs of the entire process, also with reflections on operational efficiency. In the understanding of the operationalization evaluation, these difficulties essentially explain the lower valuation of the aforementioned administrative procedures.

Is the Program capable of mobilizing the desired demand (in quantity and quality), ensuring the alignment of candidate projects with the Program's objectives, respective target groups, and support instruments, considering the characteristics of potential demand? (operational efficiency)

For the 62 calls launched by 31 December 2024, the Program shows no significant issues with demand formation, capitalizing on continuity lines of programming from the Human Capital Operational Program (POCH) and the Social Inclusion and Employment Operational Program (POISE). The Program's funding is essential for financing a significant set of public policies. However, the evidence of calls not yet launched for programming areas not based on the continuity of previous programming periods mitigates the previous conclusion. It suggests programming issues that cannot be strictly associated with demand formation problems but rather with the need for time investment in their preparation. In fact, the lack of progress of some Operation Typologies (TO) was not due to any evidence that potential demand would be limited, but rather to the need for maturation or effective consolidation of these TOs by the sectors responsible for the respective public policies in question.

The application of the Simplified Cost Methodology (MCS) is itself responsible for some delays in the publication of calls, not being directly related to demand formation in areas of continuity or innovation in programming. There are areas, such as adult education, where demand formation was higher than expected, mainly due to the amount of available resources.

Is the Program able to select projects that ensure the best fulfilment of its objectives in a timely manner? (operational efficiency)

According to the evidence collected and analysed regarding the documentation on the selection criteria for PESSOAS 2030 applications, it is concluded that there are no significant problems associated with project selection. This is largely corroborated by the assessment of promoters with approved operations. The fact that promoters with non-approved operations evaluate the application of these criteria more negatively does not contradict the previous statement, as it is in line with what is typically recorded in cases of non-approval of applications.

The situations of greatest difficulty occur in Operation Typologies (OT) with competitive access to support, particularly those in which demand has exceeded available resources, as is the case with certified modular training. In these cases, the selection criteria do not ensure the adequate ranking of applications whose intrinsic quality is not clearly distinguishable. The adaptation of the selection criteria to OT with non-competitive access, particularly those led by particularly those led by Public Policy Execution Responsible Beneficiaries (BREPP), has proceeded satisfactorily and smoothly, with no evidence of significant problems. However, it is not yet possible to assess the extent to which the selection criteria will adapt to more innovative OTs with prolonged development.

Is the Program able to monitor projects in a way that enhances their successful implementation to achieve its objectives? (operational efficiency)

In contrast to the results obtained in evaluations of other programs, the monitoring function in PESSOAS 2030 still has a significant presence, despite the implementation achieved so far focusing mainly on areas of continuous programming. This is largely due to the combined influence of problems with the application of the Simplified Cost Methodology (MCS) and the installation of the Information System (IS) supporting the Program. This idea is largely corroborated by the assessment of the beneficiary entities (55.3% consider that monitoring contributes or has greatly contributed to their capacity building), with higher values in the Central region (59.2%) and in the priorities "More initial qualification for growth" and "More and better inclusion for growth," with 67.9% and 75%, respectively.

The evaluation estimates that, as the identified problems tend to lose intensity, it will be possible to free up monitoring resources so that the launch of more innovative Operation Typologies (TO) can have the necessary support.

Is the management structure of the Program, including Intermediate Organizations (IO), adequate for performing the functions assigned to it? Is the management model and delegation of competencies to intermediate organizations suitable for the effectiveness and efficiency of the functions of the Program's Managing Authority? (operational efficiency)

Considering the demands that arose from the simultaneous closure of the PT2020 programs and the need for organizational integration of the structures of three programs, the technical assistance axis of PESSOAS 2030 allowed the implementation of a relatively complex management structure. This structure includes a Directive Commission composed of three members, six Transversal Units, and five Operational Management Units. This model tends towards stabilization, especially if, in the second phase of the Program's implementation, the problems associated with the *Balcão de Fundos* (Funds Desk) Information System (IS) and the autonomous back-office system of PESSOAS 2030 are fully resolved or mitigated. It is, therefore, understandable that, given such a complex and demanding IS, improvements are made in its functioning, whether to solve problems or to overcome constraints arising

from the complex articulation between the front-office of the *Balcão de Fundos* (Funds Desk) and the back-office system of the Program.

The action of the IOs, whose status is defined within a set of Operation Typologies (OT) and whose role in the model is globally recognized, has greatly contributed to this stabilization. Some issues identified in the fieldwork of the evaluation impose certain constraints on the actions of the IOs. These issues are related to the compatibility of the IO status and the Public Policy Execution Responsible Beneficiary (BREPP) status for different OTs, problems essentially identified by the Social Security Institute, I.P., and the widespread incidence of problems related to the information system. This issue is aggravated by the fact that some IOs must deal with different Information Systems, namely the PESSOAS IS and the Information System of programs that decided to integrate the AG+ system of the PT 2030 Information System. There is broad agreement on the proximity to beneficiaries that the IOs bring to the management model.

The evaluation estimates that the management model will be subject to increased pressure in this second phase of implementation, derived from the implementation of more innovative OTs. Therefore, it will be crucial for the model to benefit from effective improvements in the information system, reducing transaction costs and thus freeing up resources to face the new challenges of programming. Within the scope of the PAT 2030 evaluation, it was possible to confirm that the year 2025 will tend to be an important moment of stabilization for the PT2030 IS, thus aligning with what was stated in the previous period.

The implementation of the Program (commitment pace and physical and financial execution, and quality/adequacy of approved projects) to date, in each of the intervention areas, ensures the achievement of the Program's goals and objectives? (efficacy)

Based on the analysis conducted, the evaluation concluded that the Program's implementation shows heterogeneous progress in terms of commitment and execution, reflecting distinct challenges and opportunities in each intervention priority. The execution rate as of December 31, 2024, at approximately 16%, and the commitment rate of 40% indicate limited progress in the overall achievement of the goals. It is necessary to accelerate the pace of implementation to reach the defined objectives.

A critical factor identified was the difficulty in obtaining physical execution data for all ongoing Operational Themes (OT), due to constraints in the Information System (IS), which complicates comprehensive monitoring. This limitation, resulting from the prioritization of processing amendment requests in the PT2030 IS implementation, required the mobilization of contingency processes to gather data by the end of December 2024 for most indicators related to ongoing typologies. Out of the 10 ongoing typologies with collected data, 6 have already met or are close to meeting the 2024 targets, demonstrating the effectiveness of the Extraordinary Anticipation Mechanism (EAM) and reinforcing the potential for continuity of PT2020 actions.

However, a significant portion of the program exhibits greater uncertainty. Of the 56 operation typologies comprising PESSOAS 2030, 19 have not yet launched calls, and of the 37 with launched calls, 8 still have no approved applications. This reality represents 44.6% of the total OT that will not achieve the set targets for 2024.

Regarding the plausibility of mechanisms for transforming achievements into results according to the programming theories (PT), the analysis indicates that, in most typologies with closed calls, this is medium or high, signifying significant potential for achieving the Program's intermediate results.

Finally, the contracted indicators are largely aligned with the Program's objectives and results-oriented, reinforcing the Program's capacity to achieve its goals. Nonetheless, specific gaps were identified, leading to proposals for new indicators, particularly outcome indicators, to optimize strategic alignment and monitoring.

Overall, the current implementation of PESSOAS 2030 has allowed the achievement of intermediate targets and even their surpassing for most typologies benefiting from the EAM and those of continuity, assuming no changes in contextual conditions. However, a concentrated effort will be necessary to mitigate the risk of non-compliance in typologies that still lack calls or approved applications. Strengthening monitoring, accelerating approval processes, and improving the IS are essential steps to ensure the realization of the Program's overall goals and objectives.

The programmatic options included in PESSOAS 2030, as well as the rules and guidelines followed in its implementation, add value to the execution of public policies in Portugal in the intervention areas of this Program? (European Added Value)

The PESSOAS 2030 Program plays a crucial role in expanding and qualifying critical areas of public policies in Portugal. It contributes to aligning with European goals and ensures continuity of policies and instruments from the previous programming period, which was essential for securing implementation conditions in the early years of the current Program. This continuity represents a significant established demand, especially since some of these ongoing policies (such as vocational courses) rely decisively on funding from the FSE+. The importance of PESSOAS 2030 is highlighted in areas such as adult qualification, fighting social exclusion, and promoting gender equality. Without the intervention of FSE+ funds, many initiatives crucial for the active inclusion of vulnerable groups, such as migrants and people with disabilities, would be compromised or even unfeasible, particularly in disadvantaged regions.

The territorialization of the Program ensures that interventions address regional specificities, reducing social and economic disparities and promoting greater equity among territories. Additionally, coordination with other initiatives, such as the Recovery and Resilience Plan (PRR) and the Asylum, Migration, and Integration Fund (FAMI 2030), is decisive in areas like the reception of migrants and vocational training.

The management, monitoring, and evaluation model of PESSOAS 2030 significantly enhances the quality of public policies in Portugal by prioritizing concrete results, promoting accountability, and empowering beneficiaries. Structured communication and the dissemination of best practices allow for the replication of successful interventions, while monitoring systems ensure the identification of deviations and efficiently adjust strategies. However, there is room to strengthen synergy between programs, integrate learnings into future policy designs, and streamline administrative processes, optimizing costs and increasing operational effectiveness.

4. KEY FINDINGS AND RECOMMENDATIONS

Key Findings

1. Considering the implementation reported as of 31 December 2024, PESSOAS 2030 is essentially characterized by the application of the Extraordinary Anticipation Mechanism (EAM) and the existence of a high number of continuing Operation Typologies (OT) from the previous programming period. These correspond to mature public policies that have already demonstrated their relevance, effectiveness, and efficiency, although there is room for improvement in their respective indicators. This has not only provided good starting conditions for the Program but also ensured continued funding for public policies heavily reliant on the FSE+, allowing for a relatively smooth transition between programming periods in cases where the mechanism was applied.
2. The application of the EAM tended to accentuate the visible difference within the programming between domains corresponding to stable beneficiary institutions, involved target groups, and programming experience, and more innovative programming domains that have not yet been sufficiently tested. These measures require a different level of preparatory investment, as the degree of consolidation or maturity of the public policies involved varies by sector. This dimension of preparatory requirements largely explains their later start in implementation. However, it should be noted that the relationship between the application of the EAM and the continuity programming domains is not perfect. There are continuity programming domains that were not subject to this mechanism, such as Professional Internships and Hiring Support, which, with less

than a year of implementation as of December 2024, already showed a high degree of commitment and goal achievement. This means that more advanced implementation over time does not strictly depend on the application of the EAM but rather on the experience associated with the maturation and continuity of programming.

3. The number of Operation Typologies (OT) still without submitted and/or approved applications is relatively high (21 without submitted applications and 27 without approved applications out of 56 OTs, corresponding to about 48% of the total and 16.5% of the total FSE+ allocation). However, this number should be contextualized by the fact that 18 of the 27 OTs that did not have a call launched by 31 December 2024 correspond to only about 3% of the programmed FSE+ allocation. In contrast, 8 of the 27 OTs that already had a call launched correspond to about 14% of the programmed FSE+. Therefore, in terms of weight in programming, OTs without launched calls do not represent anything significant for the Program.
4. The context in which the PESSOAS 2030 programming was designed to respond to the guidelines and objectives of the PT2030 Partnership Agreement has not changed substantially in macroeconomic terms compared to the context in which the current evaluation of the Program took place. However, it should be noted that it is now possible to rely on information and research on the Program's intervention domains that deepen the understanding of the issues and challenges requiring the reaction of PESSOAS 2030. This includes evidence on the low level of skills among Portuguese adults, including younger age groups such as those aged 25 to 34, evidence of the low quality of learning as illustrated by the *2023 State of Education Report* published in December 2024, the new expression of the immigration phenomenon with the consequences of multiple associated problems, and new empirical analyses of the structural relationship between poverty and inequality. As can be confirmed, these are contextual elements to which the programming cannot remain indifferent.
5. Another contextual element that has seen significant change is the growth in the number of the foreign immigrant population, coupled with the creation of the Agency for Integration, Migration, and Asylum (AIMA) and the underlying adaptation problems. The Case Study (CS) conducted on the National Support Centres for the Integration of Migrants (CNAIM) revealed that PESSOAS 2030 has demonstrated the ability to adapt to this change. It can be said that the continued support for intercultural mediators present in the CNAIM constitutes an element of enormous relevance in the Program's response to this change in context.
6. Of the challenges that the 2030 Partnership Agreement posed to the design of PESSOAS 2030, the one that is not completely resolved is the response to the challenge of demographic decline. Addressing this phenomenon, and especially the problem of the low total fertility rate (common to Southern European countries and now practically extensive to all countries of the world, except the African continent), requires an integrated response approach that largely transcends the possible intervention of PESSOAS 2030. We are talking about a complex universe of factors reflecting the behaviour of the fertility rate that go beyond the scope of PESSOAS 2030's intervention. Therefore, it is necessary not to create exaggerated expectations regarding the Program's power of intervention in this matter. In the national context, the relevance of housing problems to counteract the structural decline of the fertility rate is an example of intervention fields that PESSOAS 2030 is not responsible for addressing.
7. The operationalization of the implementation of PESSOAS 2030 during the reporting period of this evaluation is still marked by issues more related to management and administrative processing. According to the collected evidence, these issues have had some impact on the execution of the Program. However, this impact is mitigated by the fact that operations associated with the EAM were processed under PT2020, so they were not actually affected in terms of execution by the regulations already applicable in PT2030, whether legal or those arising from guidelines and the supporting Information Systems (IS) for this new programming period. This is the case with the application of the Simplified Cost Methodology (SCM), which was not new compared to the PT2020 programs that PESSOAS 2030 adopted but whose application ended up raising operationalization problems, well documented in the minutes of the Program's Monitoring Committees, involving not only the Program's Managing Authority (MA) but also a large part of the Intermediate Bodies (IB) involved. According to what the evaluation was able to ascertain from the Program's MA, the interaction with the Financial Management Institute (IGF) mainly involved questioning the compliance with the requirements set out in the community regulations, especially the first two requirements: that the methodology allows for i) fair cost financing and ii) equitable cost financing.

- The discussion of the second requirement, which concerns the possibility of this cost being verifiable at the execution level, had a simpler resolution. This was generally easier to demonstrate.
8. Another issue that impacted the agility of the entire implementation process during this period stems from the problems of stabilizing the PESSOAS Information System (IS) in the context where the Program fulfilled the obligation to join the single-entry portal of the *Balcão de Fundos* (Funds Desk, the front-office of the PT2030 IS). PESSOAS 2030 opted for having its own back-office system, which for this reason starts to relate to the data hub of the PT2030 IS and becomes dependent on changes introduced in the aforementioned front-office system. Several consulted Intermediate Bodies (IBs) reported difficulties in using and relating to the IS, and the Program's difficulties in having physical execution data are also linked to the insufficiency of the PT2030 IS. According to what the evaluation was able to ascertain from the Information Systems Unit of AD&C (the public agency responsible for promoting development and cohesion policies in Portugal), the late implementation of the conditions for reporting the physical execution of operations is mainly due to the fact that priority was given to the modules for introducing amendment requests for applications, a priority that was practically consensual among the Managing Authorities (MAs).
 9. A Program that inherits and accommodates the structures of three PT2020 programs would inevitably face problems of integrating organizational cultures. The start-up evaluation of PESSOAS 2030 signals this issue, estimating that the transition to a cruising speed of implementation with the start and beginning of the execution of the more innovative dimensions of the programming will tend to support organizational integration, highlighting here the role that the transversal units of the management structure can play in this integration.
 10. The information on the physical execution of the Program reported in the evaluation as of 31 December 2024 is insufficient, although it has enabled an in-depth analysis of all priorities and many of the Operation Typologies (OT) with open calls. The detected insufficiency is mainly due to the limitations of reporting this execution at the funds desk by the beneficiaries until the production of the operations' reports. It is estimated that as the issue of the conditions for the requests for amendment of applications is consolidated, the Information System (IS) will be very close to being able to report the physical execution of the operations, thus allowing to fill some of the previously mentioned insufficiencies, for example, the more in-depth identification of the target audiences covered.

Recommendations

R1: Resolve the insufficiencies and stabilize the single desk dimension of the PT2030 Information System (SI) and operationalize the interaction with the back-office system of the SI PESSOAS 2030.

R2: Create conditions for better clarity in the articulation between the Operation Typologies (OT) of priorities 4D (More and better inclusion of people at risk or in situations of social exclusion) and 4E (More and better access to quality services) of PESSOAS 2030 and the Regional Programs, in order to mitigate the existing fragmentation of measures, specifically by guiding the Regional Programs to clarify the types of actions they intend to develop within their scope of action.

R3: As an extension of the previous recommendation and considering the conclusions reached in the analysis of relevance and coherence, and the observed difficulty in 'territorializing' the impact of the Programs in the regions where they intervene, it is recommended that, within the functional articulation network or in the context of specific meetings promoted by the Managing Authority (MA), involving the technical structures of the MA, the Regional Coordination and Development Commissions, and the aforementioned Regional Programs, a review of the Program's intervention in the three regions be conducted using the results of the Operationalization Start Evaluation, extracting specific information to support this review.

R4: It is recommended to assess the intervention experience of the Intermediate Bodies (IB) in this first phase of the Program's implementation, discussing all operational difficulties that the OI have reported in this evaluation.

R5: Without detracting from the recognition that the recently approved reprogramming has already adopted recommendations that emerged during this evaluation, it is recommended that adult requalification and actions concerning the target group of immigrants and the local and institutional conditions for their reception and integration be given particular attention and reinforcement of resources.

R6: It is recommended to refocus the Program's intervention priorities regarding the approach to the demographic challenge, clarifying the contribution that the PESSOAS 2030 can provide to this objective within its programming scope.