

**EVALUATION STUDY OF THE  
IMPLEMENTATION OF THE ESF  
OPERATIONAL PROGRAMME RUMOS IN  
THE AUTONOMOUS REGION OF MADEIRA**



**Executive Summary**

April 2010

Os melhores RUMOS para os Cidadãos da Região

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## **EXECUTIVE SUMMARY**

This section presents an executive summary of the Final Report on the Evaluation Study of the Implementation of the ESF Operational Programme (OP) Rumos in the Autonomous Region of Madeira. The report results from the interactive work carried out by the evaluation team, the Management Authority and its technical staff and the Follow-up Committee and benefited from a vast set of research activities such as an analysis of OP-related documents and the available information system, structured interviews with the OP's management bodies as well as a survey and case studies carried out among the OP Rumos beneficiaries.

### **Object of the evaluation study**

Following the OP Rumos programme theory, the evaluation of the OP implementation focused on the working conditions and the relationships between the domains and typologies of intervention as well as the expected results from the implementation of projects. The evaluation study has also been focused on the causality mechanisms operating between the typologies of intervention and the identification of critical factors influencing the expected results.

The OP Rumos is one of the main instruments that can be implemented to achieve the strategic priority "Human Potential and Social Cohesion" of the Economic and Social Development Plan of the Autonomous Region of Madeira 2007-2013, which is targeted to fight against the following set of problems: i) drop-outs and school failure; ii) the low skills prevalent among the region's active population and the low demand for training; iii) the rising trend of unemployment; iv) firms' low absorption of the skills generated by the regional training system; v) the increase of social exclusion and marginality. The OP is organised along two priority interventions axes (axis 1: Education and Employment and axis 2: Employment and Social Cohesion, with the first being significantly more important in financial terms). A third axis concerns the technical assistance to the management authority.

Regarding the already mentioned programme theory, the evaluation study has identified a set of critical factors affecting the targets associated with the main typologies of the OP intervention.

## Objectives and evaluation questions

The objectives of the evaluation study were:

- To evaluate how pertinent the organisation and management model of the OP was, namely considering its strategic priorities and among them those established by the Economic and Social Development Plan 2007-2013;
- To evaluate the coherence between the OP implementation conditions and its strategic priorities materialised in the two previously mentioned priority axes;
- To evaluate the degree of conformity between the typologies of intervention of each priority axis and the pattern of demand for ESF support;
- To understand how the OP strategic priorities, objectives and goals have been fostered and, as a result of this, to identify significant gaps in the implementation of each priority axis.

The evaluation study has been focused on the following questions:

<b>Evaluation questions regarding the governance, organisational, management and follow-up model</b>
Q1: Were the institutional and organic changes introduced in the management model operational and conducive to a more efficient and effective programming period relative to the last (due, for example, to the delegation of competencies from the Management Authority to the Intermediate Bodies)?
Q2: Do the adopted solutions regarding the OP management and development fulfil its objectives and goals?
Q3: Are the resources mobilised to implement the OP adequate and sufficient? Would it be possible to increase the implementation level with the same resources?
<b>Evaluation questions concerning the implementation instruments</b>
Q4: Is the specific regulation about the OP typologies of intervention adequate and effective regarding its operational objectives?
Q5: Have the selection criteria adopted to assess and rank the submitted tenders been effective in supporting pertinent projects regarding the OP objectives and goals?
Q6: Are the manual of procedures available to users and the respective forms simple and adapted to the dimension of the projects? Is the information generated by the forms useful and sufficient in the analysis of the tenders submitted to the OP?

Q7: Has the OP launch model been effective concerning the required pace of implementation of the several typologies of intervention?
<b>Evaluation questions concerning the pace and quality of demand as well as the achievement of the OP strategic priorities?</b>
Q8: Is the profile of the promoters demanding eligible co-funding adequate to achieve the objectives of the OP priority axes?
Q9: Is the pace of the promoters' demand and the quality of the tenders presented to the several typologies of intervention in line with the expected profile and the main selection criteria of the OP priority axes?
Q10: Are the approved projects in line with the strategic orientations concerning the reinforcement of the competitiveness of the regional economy?
Q11: . and those regarding higher levels of integration and the employability of trainees?
Q12 ... and those concerning the established priority of targeting the low educated and low skilled?
Q13: Do the approved projects' profile and dimension allow the achievement of the goals established in the Priority Axes?

## Methodology

The methodology used in the evaluation study of the Rumos OP implementation results from the complimentary application of the programme theory (already mentioned) with a set of information gathering methods. Each one of the previously mentioned evaluation questions is answered, first, through a synthesis of the results of the evaluation results then a deeper analysis and, finally, the identification of the information gathering methods and sources invoked to support those results.

The information gathering methods combined: i) document analysis of OP-related information and literature; ii) the exploration of the potential of the information system; iii) structured interviews with a diversified set of stakeholders which have been very influent in conceiving the OP programme theory; iv) case studies; v) a survey of the OP's beneficiaries.

The following entities were **interviewed**: IDR, the Regional Development Institute/ Management Authority; the Technical Staff of the Management Authority and the OP's Information System; DRQP, Vocational Training Regional Direction; IEM, the Madeira Employment Institute; CITMA, Madeira Science and Technology Centre; J.Cardoso, Alto Lido Hotel; EPHTM, Madeira Vocational Training School for Hotels and Tourism; PROINOV, a Consultancy Firm on Management, Training and

Multimedia; DTIM, the Madeira Regional Association for the Development of Information Technologies; and the Madeira Union of non-profit social security institutions. In a second phase, three more in-depth interviews have been done to: the Technical Staff of the Rumos Management Authority; DRQP, the Vocational Training Regional Direction; IEM, the Madeira Employment Institute

The survey of the **beneficiaries** focused on promoters that had approved as well as rejected projects submitted to the Priority Axis 1 until September 2009, divided by typology of intervention. The survey universe (population) involved 331 unities, corresponding to 227 promoters and 837 projects. The survey was answered online. Each promoter had an ID user and a password by typology of intervention. The survey was available on-line from the 18th of November to the 10th of December, with reminders sent on the 26<sup>th</sup> of November, in order to increase participation. The final sample consists of 126 valid answers involving 99 project promoters. Considering that the number of valid answers in some of the typologies of intervention was low, the study decided to aggregate some of the typologies of intervention. The final percentage of valid answers was 38%. Considering this percentage and the universe, the sampling error was 7.02% for a 95% level of confidence. So, the conclusions are valid for the sample but one cannot extrapolate them for the universe.

The two **case studies** aimed to gathered information on two key dimensions of the evaluation study: i) the adequacy of the OP implementation modalities; ii) the contribution of the approved projects in materialising the OP strategic priorities. They involved document analyses of the OP-related information and the exploration of the survey results regarding the beneficiaries and the network of stakeholders participating in the programming and the implementation of projects. The two case studies concerned the typologies of initial qualification (promoter Madeira Hotel Vocational Training School) and that of adaptability, apprenticeship and lifelong learning (promoter PROINOV, Consultancy Firm in Management, Training and Multimedia).

## **Main conclusions**

**1.** The methodology that supported the OP Rumos evaluation underlined the relevance of the programme theory in identifying the programming critical factors, when one considers its objectives and the governance model that has been implemented. The more in-depth analysis of these critical factors (see the following picture) allowed, in each OP intervention typology, the identification of the relationships established between these critical factors and the OP implementation mechanisms, which were the main object of this evaluation study:

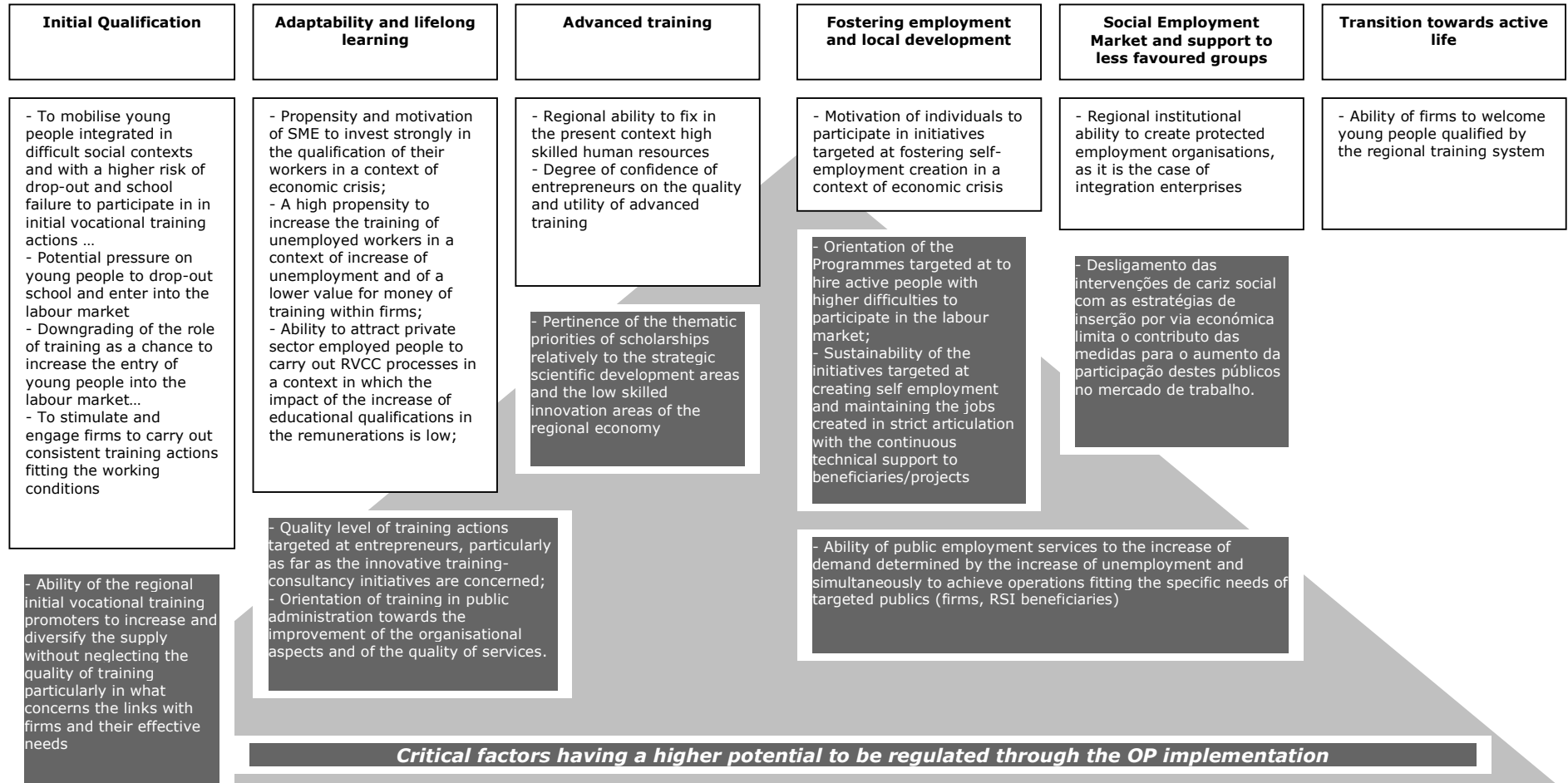
**Regarding the initial qualification typology,** the evaluation identified as a critical factor the “ability of initial training regional operators to increase and diversify the supply without ignoring the quality prerequisites, namely concerning the relationships with firms and their effective training needs”;

**Regarding the adaptability, apprenticeship and lifelong learning typology,** the evaluation stressed as a critical factor that of implementing training initiatives targeted to entrepreneurs. It considered the Region’s innovative intervention concerning training consultancy and the orientation of training provided to the Public Administration towards organisational upgrading and services quality. This clearly aimed at improving the role of public administration bodies in facilitating the transition of the regional economy towards a new paradigm of regional competitiveness and employment;

**Regarding the advanced training typology,** the thematic guidance of scholarships towards strategic fields of scientific development and innovative regional economy domains with higher human resources needs has been selected as a critical factor;

**Regarding the typology on supporting employment and local development,** the study identified the following critical factors: i) targeting hiring programmes towards workers facing higher difficulties in entering the labour market particularly in periods of crisis.; ii) improving the sustainability of the initiatives that have been launched and the possibility of maintaining jobs and the continuation of the connection with the technical support provided to the beneficiaries / projects;

**The OP Rumos programme theory: – critical factors and implementation instruments**





**Regarding the social market employment and support to the less favoured groups typology**, the evaluation identified the lack of articulation between the social interventions and the economic integration strategies as an implementation critical factor. This weakens the contribution of these measures in increasing the level of participation of these groups in the labour market;

**As far as all the typologies linked to employment policies are concerned**, the ability of the employment public services to adapt to the more intense demand generated by the increase of the unemployment rate and its structural dimension and simultaneously implement interventions fitting the needs of specific groups is another critical factor in the implementation of the OP.

**2.** The critical factors presented in the previous section should be taken into account when adjusting the OP, considering that it will enter a stage in which it is necessary to increase the speed of execution of the projects already approved and to reinforce follow-up processes.

**3.** The way in which the several OP implementation mechanisms can reinforce the regulation of the critical factors identified in the programme theory should be understood as an important area of strategic thinking within the OP, which can also be fostered by the general and specific recommendations generated by this evaluation study. These critical factors, being associated with the implementation conditions, are identified in the joint picture and are essentially linked with the projects' quality and "engineering" throughout the conception, setting up and development stages. Therefore, the evaluation assumes that the implementation mechanisms could play a more active role in inducing more qualitatively consistent projects considering the difficulties of acting in this field arising from a very heterogeneous system of actors both regarding their motivations and the competences required in the projects.

**4.** Relative to the broader framework of critical factors, the evaluation study could hardly include an in-depth analysis of the way in which these are formulated and whether they represent an effective threat to the achievement of the OP objectives. On the contrary, we think that the evaluation study should be essentially focused on improving the knowledge about the OP and its internal consistency. However, throughout the field work, the study gathered evidence that confirms the relevance of some of the aspects stressed in the programming theory, namely: (i) the difficulties in mobilising young people coming from less affluent social contexts to

enrol in vocational training courses as well as the problem of early school leaving to enter the labour market; (ii) the easy access of vocational training graduates to the labour market, mainly in hotel and tourism activities, combined with precarious contracts and low wages, shows how firms' investment in training still provides low value-for-money; (iii) the low motivation of SMEs to invest in the accumulation of skills is clearly a strong determinant of the weak propensity to release workers so that they can participate in training actions.

**5.** From a global point of view and in comparison with the previous programming periods, the OP Rumos shows changes in the governance model that are coherent with the role assigned to the ESF interventions in promoting the transition towards the new regime of regional competitiveness and employment agreed for the Region in the 2007-2013 period. This transition should be considered in light of the impact that the crisis has had in the Region, particularly regarding the sector leading the Region's process of internationalisation – tourism. In this context, the study recommends for the strategic dimension supporting the OP programming (seen in light of both the PDES as well as the PRE and PRIO orientations) to be reassessed particularly taking into account the impact of the international economic crisis. Similarly, the ESF interventions should be reconsidered with a view to reinforce its contribution to a new stage of development in the Madeira region. This aspect should be addressed in the OP mid-term evaluation that is to be launched in the second semester of 2010.

**6.** The decision assumed in the OP Rumos governance model of considering the DRQP and the IEM as, respectively, an intermediate body and an OREPP is a chance to increase the effectiveness of the governance model. This is the case particularly in light of the possible role of the IDR as a key element in integrating the impact of the Structural Funds in the Region and in reinforcing the articulation between the management of the OP and its political coordination. Notwithstanding this, the initial phase of the OP implementation didn't succeed in taking full advantage of the DRQP and IEM specific competences. It is also the case, however that in the next phase of the OP implementation it will be easier to achieve these results.

**7.** The strategic monitoring procedures implemented by the Management Authority with technical assistance provided externally to the Technical Staff may be considered as a good practice in terms of the monitoring of the programming activities. This process complements the organisation of structured moments within the OP governance model that stimulate an open strategic thinking about the OP

management and implementation and its integration / contextualisation within the QREN framework. This good practice will be consolidated principally if it succeeds in better integrating the physical implementation of the approved projects and the speed of implementation of the Priority Axis II. In a similar way, the implementation of the Business Intelligence Data Mart System (called “Conhecer FSE), as rapidly as possible, will be an additionally relevant instrument in allowing the Management Authority and its technical staff to monitor the programme in strict complementarity with the strategic monitoring process.

**8.** In the present stage of implementation of the information system, it shows some shortcomings concerning the level of updated coverage of physical and financial implementation data on operations approved under the typologies led by the IEM-OREPP. We think that these shortcomings will be vanished at short term, depending on the full implementation of the IEM status as OREPP and on the availability of data in the SIIFSE about the implementation of active employment policies. The combined implementation of these improvements and of the SIIFSE’s module “Conhecer FSE” will significantly increase the SIIFSE potential as a management support instrument.

**9.** Considering that the Technical Staff Bodies are well dimensioned in human and technical terms, the study recommends that the management of human resources should be oriented towards a more effective increase of the OP implementation levels, focusing their activity in local certification missions. This priority is also important for the Technical Staff Body of the IEM-OREPP, which is not benefiting from the OP technical assistance.

**10.** According to the Priority Axis I promoters’ survey results , it will be possible to improve the effectiveness of the projects follow-up by the Technical Staff (about 28% of the promoters mentioned the administrative/financial follow-up and about 25% the technical follow-up of contents and processes as priority interventions). Upgrading the ability to answer the promoters’ demands and accelerate the implementation also represents a key priority to focus the Technical Staff intervention, having a potential strong impact on the OP implementation.

**11.** Similarly, it is also necessary for the follow-up activities to be more effective in proposing quality improvements to the projects and to be less reactive and administrative-led. The Management Authority’s promotion of collective meetings with the project promoters targeted at stimulating experience-sharing could also be

a good practice by contributing towards higher effectiveness levels regarding the implementation of projects.

**12.** The regulation framework supporting the implementation is recognised as “very clear” or “clear” by the majority of promoters included in the survey and it results from a strict articulation of the interventions of the DRQP, the CITMA and the IEM in processing and analysing the tenders to the Priority Axes I and II. These entities play a fundamental role in helping promoters and/or beneficiaries in providing information and clarifications concerning the implementation procedures as well as through more personalised contacts or by diffusing complementary materials (as manuals, for example). Notwithstanding this conclusion and in order to further focus the intervention of these entities, their specific regulation can still be improved in the following aspects: i) it doesn’t specify the existence of standard actions within each typology of intervention; ii) it also doesn’t indicate the eligible expenditures; iii) it doesn’t present all the criteria that will be necessary to analyse the tender and iv) it doesn’t mention the existence of other criteria.

**13.** It is possible to improve the selection criteria used in the analysis of projects so that those approved increase their contribution to the OP strategic objectives and goals. Notwithstanding the relevance of the employment policy’s support instruments (priority axis II), the selection criteria used in this axis could still be improved, particularly in terms of allowing an evaluation of the projects’ contribution towards the fulfilment of these objectives and goals and of some selected domains. This is particularly the case in the last typology of the Rumos intervention which was targeted towards integrated projects (that took into account, for example, partnerships, projects’ complementarity ...).

**14.** In the selection criteria used by the MA, the link between the project and the socio-economic needs of the Autonomous Region of Madeira is a key point and it represents a good practice, principally because the Technical Staff Body is using evaluation frameworks based in assessments of the training needs and measuring the intensity of this link. Here, the relevance attributed to the more technical and specialised assessments elaborated by the certificated entities should be stressed even if the study suggests an effort to clarify what the quality prerequisites demanded are.

**15.** The availability of sound evidence supporting the application of the selection criteria is relevant in allowing them to induce better quality projects in light of the objective of linking these projects with the Regional socio-economic needs.

**16.** As far as the manuals of procedures are concerned, the evaluation study concluded that they act more as instruments supporting the elaboration and implementation of the tenders and less as instruments to lead the projects towards the achievement of strategic priorities. This last aspect could be significantly improved. In a global situation in which the manuals are well accepted, the survey targeted at the promoters within the priority axis I shows that about 1/5 of the promoters say that the manuals are unclear and about 12% think they have not facilitated the preparation of the tender. This conclusion suggests that the manuals could be improved, even from the point of view of helping the elaboration and the implementation of the tenders.

**17.** As far as the forms are concerned, they are a good instrument to enforce the selection criteria. The evaluation collected evidence of improvements introduced to tackle specific shortcomings such as, for example, adjustments to e-learning projects. Yet, the forms could be significantly improved increasing their contribution to the conception of indicators on the results of the OP implementation.

**18.** Regarding the OP's launching strategy, the accumulated knowledge regarding its intervention instruments suggests that the transversal communication of the OP Rumos has been effective, although it is practically impossible to assess the effects of this communication in inducing higher levels of demand. The communication strategy faced more difficulties in focusing on specific publics (for example the communication is not segmented by typologies of intervention). Focusing the communication strategy is particularly important in the next phase of implementation, given the high level of commitment already achieved. Concerning the calls for tenders, it is possible to orient them towards the chosen demand priorities, following for example the experience of CITMA. Considering the insufficient information gathered through the evaluation exercise, the study recommends that the Management Authority launches the evaluation of the impact of communication, information and publicity activities among the population in general.

**19.** Regarding the issue of how the promoters profile contributed to the achievement of the objectives of the OP Priority Axis, the priority axis I is characterised by a significant dispersion of beneficiaries, which resulted from changes in regulations as well as in the context of the OP. The participation of regular schools and of mainland training firms illustrates this fact. The observed low level of specialisation coexists with the generally low average quality of the tenders,

as objectively and consistently illustrated by their low classification. Simultaneously, the Management Authority's qualitative assessment identified the existence of shortcomings concerning the assessment and evaluation of training needs. The interviews with beneficiaries confirmed the need of integrating new quality prerequisites in the training process, namely through the integration of data regarding the results and impacts of the ministered training programmes. It is therefore possible to formulate a broader recommendation stressing the need to create follow-up procedures that can complement the analysis of tenders, orienting these towards the increase of the average quality of already approved as well as of ongoing and new operations.

**20.** The results of the evaluation study show that the OP Rumos does not have an acute problem of demand. The relevant question is whether it is possible to reinforce the contribution of the OP to achieve the already mentioned strategic objectives, namely by guaranteeing that better quality operations regarding the current and established practices are approved. The presentation of solid proposals, the assessment of training needs and the implementation of evaluation mechanisms should be understood as priorities to be enforced, either through focused communication actions, or through calls for tenders which provide enough time to integrate the new prerequisites or through selection criteria inducing the promoters to satisfy them. This observation takes also into account the analysis of the gaps between the number of tenders accepted and approved (axis 1), revealing that about one half of the tenders have been rejected. The recent change observed in the training regional market showing an increasing participation of the training firms of the mainland has been also taken into account.

**21.** This is a relevant issue particularly because the perception of the Management Authority of the training quality problems doesn't fit the results of the beneficiaries' survey. Only 25,4% of the surveyed promoters think that the technical follow-up of the projects by the MA technical staff represent an opportunity to improve the OP, which indicates that the great majority of the beneficiaries doesn't need technical support or think that it is not a crucial intervention of the MA. On the contrary, the results of the interviews and of the case studies present it as a priority of the OP, which is a curious conclusion considering that the beneficiaries interviewed develop qualitatively different training operations. Similar recommendations are a consequence of this conclusion: to improve the preparation and follow-up

mechanisms of tenders in order to stimulate higher qualitative levels of training operations.

**22.** The contribution of the OP Rumos to achieve the programming strategic priorities targeted at reinforcing regional competitiveness and the integration and employability of both trainees and the low educated and low-skilled depends strongly on the quality of the approved and implemented operations. The transversal nature of employability within the OP, the crucial role of traineeships (considering that they improve access to the labour market and that they involve a high number of beneficiaries) and the interventions targeted at the unemployed (training, RVCC and occupational programmes) allow us to conclude that it is particularly in the domain of the strategic orientation of employability that one may expect the most promising results. The few data gathered about the low educated (with the exception of some typologies within the second priority axis) doesn't allow us to formulate a capable answer to this orientation. As far as competitiveness is concerned, a higher impact depends upon the quality of the interventions regarding the training consultancy programmes targeted at entrepreneurs and managers.

**23.** The OP's relative failure in contributing to the fulfilment of the regional competitiveness objectives is mainly associated with an absence of rigorous links in the tenders between the training and the organisational or investment processes with relevant impacts on firms' productivity thresholds. The firms' failure to consider the return associated with training investments is at the heart of this problem. There are no pilot projects oriented towards this objective in the OP implementation. The existence of these pilot projects is fundamental in order to induce co-funding demand for this type of projects. Without them is practically impossible that the analyses of tenders fulfil the criteria that regulate the impact of training on competitiveness.

**24.** Considering the level of approval / commitment of the different typologies, the evaluation study doesn't anticipate significant problems in achieving the established goals. Although some typologies present a significant gap between approval and implementation, in general the study didn't identify any critical factors hindering the achievement of the OP's main goals. In the short and medium term, the challenges are different. An important challenge consists in conciliating the OP financial endowment with the expectations and the pace of demand, namely concerning the training of active workers and the typologies linked with the fight against unemployment which are increasingly central. In sum, to accommodate the

high level of commitment already achieved, to integrate new needs and to allow for a permanent intervention in tackling unemployment, without ignoring the quality issue of the operations, all represent important challenges to the OP Management Authority Bodies.

## **Recommendations**

In the last section, this study presented a set of conclusions and orientations that should constitute transversal recommendations to the major domains of the evaluation. In this section, we present other complementary recommendations.

### ***Specific recommendations on:***

#### **I. The governance, organisational, management and follow-up model:**

1. To reinforce the involvement of the intermediate bodies and of the OREPP in the OP management in order to take full advantage of their experience and specific competences either in managing ESF interventions or in the implementation of education, training and employment public policies;
2. To stimulate the strategic monitoring of the OP implementation and execution by integrating physical implementation, by increasing the dynamics of this function and by ensuring a stronger involvement of the governance stakeholders (namely the entities with delegated competences and particularly the IEM) in the discussion of which critical factors affect the expected results. Considering that the operational system SIIFSE doesn't allow the integration and consequent utilisation of all the pertinent information generated by the IEM and that the methodology used in the bi-annual strategic monitoring of the OP and in the evaluation of the communication strategy has not emphasised the results achieved in the second priority axis, it is essential to increase the involvement of the IEM in the OP's transversal management activities.
3. To promote a fast integration in the SIIFSE of the information resulting from the implementation of the operations managed by the IEM-OREPP in order to allow a deeper knowledge about the effective implementation of the OP and to launch a broader strategic monitoring process which balances the two priority axes.



4. To generalise the utilisation of the “Conhecer FSE” system by the technical teams associated with the OP management and to facilitate and stimulate the use and the follow-up of data on the OP implementation as well as of the results obtained regarding both the typologies and the intensity of the management technical staff needs.
5. To ensure the continuity of the optimisation of the SIIFSE working conditions in order to reduce its complexity and the time that users need to access and work on it.
6. To re-evaluate the access conditions to the OP technical assistance by the entities which are involved in managing the OP. Considering that there is no regulation prohibiting the access of an OREPP manager to the technical assistance co-funding, this support to the delegated activities will facilitate and promote a broader and more effective intervention of the IEM in a context of increasing unemployment.
7. To reinforce the follow-up activities after the approval of the projects, principally the technical follow-up (contents and processes), in order to monitor and evaluate the achieved results.

**II.** The indicators framework:

8. To consolidate the use of specific indicators to support the continuous monitoring and ongoing evaluation of the OP as well as to support the evaluation of enlarged periods of implementation.
9. To conceive and implement a revision of the indicators framework according to their specific use (continuous monitoring/evaluation or monitoring during enlarged periods) taking into consideration the following aspects: i) the scope of the indicators regarding the objectives hierarchy; ii) their description; iii) the link with the feasibility principle and the eventual decision of considering as priority indicators those aiming at (a) evaluating the OP strategic options (the young people’s initial vocational training, the fight against unemployment, the qualification of public administration workers) and (b) introducing innovative aspects (as training consultancy to managers and entrepreneurs, RVCC, ...).

### **III.** The implementation instruments:

10. To launch a revision of the regulations, introducing other contents, namely: standard actions in each typology of intervention and additional elements to characterise those targeted at formatting the submitted projects.
11. To assume a proactive decision of updating the orientation procedures to open new periods for the presentation of tenders, taking into consideration the less clear aspects identified by the MA technical staff after contacting the promoters. This exercise can be detached from the update of regulations being included in the announcement of new tenders or they can be autonomous.
12. To eliminate the duplication observed between selection criteria in strictus sensus and those of the general grid of project analysis as well as between the transversal and specific assessment domains (for example innovation and methodologies). After concluding this exercise, the study recommends the revision of the relative score of the criteria, reinforcing the relevance of the key aspects associated to the quality of processes (contents and methodologies).
13. To specify in the official documentation the way in which each criteria will be applied and to clarify the framework that will be used to assess and score the operations. It should be avoided that promoters know some of these aspects for the first time through the contact with the tender form.
14. To introduce instruments to gather quantitative information on the results generated by the projects in the forms for the elaboration of tenders and in the selection criteria
15. To reorient the OP's communication and information strategy to implement the recommendations concerning the monitoring of the Communication Strategic Plan.
16. To emphasise the introduction of specifications oriented towards the establishment of priorities in the calls announcing the opening period for presenting tenders, defined according to the objectives established by the OP.

17. To assess the possibility of revising the blocks of the SIIFSE form associated with the follow-up and evaluation, increasing its ability to support the analysis of tenders.

**IV.** The pace of the demand and the projects quality:

18. To widen the follow-up activities (concerning not only the administrative and operational procedures but also the technical components of the projects) throughout the implementation of projects or by local verifications after their implementation is completed. This type of follow-up of the several typologies may be defined using criteria associated namely with the financial endowment, their relevance towards the OP objectives, the innovative characteristics of the intervention and the difficulties perceived by the MA regarding the quality of tenders.

19. To promote initiatives targeted at rewarding and diffusing the social value of the better quality projects, creating each year a specific award for the best practices and by communicating them in the Rumos web site. With the collaboration of independent experts, this experimental initiative could be an important factor to differentiate the market, diffuse best practices and foster the increase of the quality level of the projects

20. To promote the organisation of events (seminars, workshops, training actions) oriented towards the increase of the Region's competencies in key areas regarding the quality of training projects and the labour market integration of trainees (such as the "engineering" of training projects, the assessment of training needs, the evaluation of training activities and training as an instrument facilitating the social integration of less favoured groups, ...).

**A final note on the implementation of the recommendations**

The evaluation study considers that the implementation of the broad set of recommendations presented in the previous sections generates new challenges to the Management Authority (MA) and requires, in particular, the establishment of priorities to tackle them and the ability to mobilise resources in line with the new intervention domains in the OP.

It should be stressed that the implementation of some of these recommendations is not an exclusive task of the MA, requiring on the contrary a strong articulation with the entities that regulate the ESF interventions since that they are practically common to all the ESF interventions. Notwithstanding this, a coherent reply to these recommendations requires the preparation of a master plan involving the assessment of the demanded resources and the definition of the timing to implement them. The OP Rumos mid-term evaluation will be the right moment to outline this global adjustment plan and should be seen as a priority.

Regarding the organisational structure of the MA, this evaluation study concluded that the OP faces no significant problems in terms of human resource endowments. The size and composition of the technical bodies are well adjusted to the working conditions. However, some of the recommendations that have been addressed, due to their technical and human resources requirements, can significantly change this conformity. The DGQP and IEM technical teams will be under pressure to integrate some of the proposed changes, principally because they need to organise specific working groups to achieve some sampling plans in order to contact the projects' promoters.

The mobilisation of external resources and the support of the Technical Assistance Axis can minimise this pressure. The contracts with external teams and the mobilisation of experts to some services, such as, for example, to the local verification of operations, the merit analysis and the implementation of studies, technical advice or other supporting frameworks can relieve the technical teams from other tasks and, simultaneously, help the consolidation of internal competences. So, the evaluation recommends the preparation of a global action plan targeted at launching a new phase of technical support to the OP.