

# Evaluation of the contribution of Portugal 2020 to the qualification and employability of adults

## Batch 1

Evaluation of the contribution of Portugal 2020 to the  
qualification of the adults and (re)integration in the job  
market

Executive Summary  
23 March de 2022

Contracting authority:



Operational Programmes involved in the evaluation:



Co-financed by:



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## 1. Goals, Scope and Evaluation Objectives

The current study is conducted to evaluate the contribution of Portugal 2020 (PT2020) to the increase in the qualifications and employability of adults. Specifically, in this Batch 1, the assessment targets adults in a situation of unemployment or inactivity.

The operations being evaluated were financed by two thematic Operational Programmes (OP)- Human Capital Operational Programme (PO CH) and Social Inclusion and Employment Operational Programme (PO ISE) and by the seven Regional Operational Programmes- Regional Operational Programme of Norte (PO Norte), Regional Operational Programme of Centro (PO Centro), Regional Operational Programme of Lisboa (PO Lisboa), Regional Operational Programme of Alentejo (PO Alentejo), Regional Operational Programme of Algarve (PO Algarve), Regional Operational Programme of Açores (PO Açores) and Regional Operational Programme of Madeira (PO Madeira). The intervention was structured across three different Investment Priorities (IP), namely: IP 10.3 - *Improvement of equality in accessing lifelong learning to all gender groups, in formal and informal contexts, knowledge and skills update for workers and flexible learning processes*; 8.5 - *Adaptability of workers, companies and entrepreneurs before change*; and IP 9.1 - *Active Inclusion, targeting equality of opportunities, active participation and employability*.

The instruments (Types of Operation - TO) considered in the scope of this evaluation (Batch 1) include not only the TO specifically designed to target the unemployed and inactive population, namely the Modular Training for long-term unemployed (*Formação Modular DLD*) and the Active life for unemployed and long-term unemployed (*Vida Ativa DLD*), but also the TO whose target includes the employed adults (hence also included in the evaluation conducted in the scope of Batch 2), namely Centres for the Qualification and Professional Education (*CQEP/CQ*), Courses for the Education and Training of Adults (*EFA*) and the Modular Training for Employed and Unemployed (*Formação Modular*).

Throughout the period 2015-2019, a total of 6.514 applications were submitted to the aforementioned TO, of which 6.450 had received a decision regarding their acceptance by 31/12/2019. Out of the latter, 35% (2.272) had been approved and 1% (46) were concluded. The average rate of approval of these TO was 35%, which is below the average reported by PT 2020 at the date (63%).

Funding of 702 M€ in the scope of the Social European Fund (ESF) had been attributed to the projects approved by 31/12/2019 within the TO considered in this Batch 1, which is below the average grant rate (84%). Out of this funding, more than 459 M€ was attributable to actions that targeted unemployed or inactive adults (a value that was estimated through the number of participants).

**Table 1. Amount of the ESF approved and participation - allocation to the unemployed or inactive adults | 31/12/2019**

IP/TO	Approved Amount ESF (€, thousands)	% of total	Number of participations	% of total
<b>IP 10.3 - Improvement of equality in accessing lifelong learning</b>	<b>210 678</b>	<b>45.8%</b>	<b>73 316</b>	<b>7.6%</b>
CQEP's/CQ	60 673	13.2%	49 759	5.2%
EFA	150 005	32.6%	23 557	2.4%
<b>IP 8.5 - Adaptability before change</b>	<b>129 249</b>	<b>28.1%</b>	<b>576 240</b>	<b>59.9%</b>
Formação Modular (employed and unemployed)	12 248	2.7%	50 328	5.2%
Vida Ativa	117 001	25.5%	526 002	54.7%
<b>IP 9.1 - Active Inclusion</b>	<b>119 734</b>	<b>26.0%</b>	<b>312 178</b>	<b>32.5%</b>
Formação Modular DLD	95 547	20.8%	177 677	18.5%
Vida Ativa DLD	24 187	5.3%	134 501	14.0%
<b>Total</b>	<b>459 661</b>	<b>100%</b>	<b>961 824</b>	<b>100%</b>

Source: EY-Parthenon based on data from PT2020 information system

It is worth noting that the funding channelled to the TO EFA, Vida Ativa and Formação Modular DLD amounted to 33%, 26% and 21% of the aforementioned value of the Social European Fund, respectively. From the analysis per NUTS II, it can be concluded that the region Norte concentrated 51% of the approved funds, Centro received 26%, while Alentejo received 11% and nearly 7% of the funding was allocated to the Autonomous Region of Açores. The regions of Lisboa and Algarve received only 1% of the approved funding and the Autonomous Region of Madeira less than 1%.

Regarding the physical implementation, 961.824 participations were registered in the scope of the TO targeting unemployed and inactive adults. Out of these participations, 90% were partially or totally certified. More than half of the participations (520.000) regard the TO Vida Ativa, followed by the TO targeting long-term unemployed adults which accounted for 32% of the total participation.

The training initiatives being evaluated were mainly of short-time duration, with courses with a duration inferior to six months responsible for 96% of the certified participation, out of which, 21% correspond to training that took less than one month to complete. The majority of certified participations are attributable to participants that held an educational level corresponding to the 3<sup>rd</sup> cycle of basic education, secondary education or post-secondary education. Analysing the certification rate per education level upon entry, it is noticeable that the participants who held an educational level lower than the 1<sup>st</sup> cycle of basic education are the ones holding the highest rate of non-certification (14%, compared to the average rate of 5%).

## 2. Methodology

This evaluation resorts to two impact analysis methods, namely the Theory-Based Evaluation (TBE) and the Counterfactual Analysis (CA). In the scope of the TBE, the Theory of Change (ToC) was structured by the evaluation team and consented in the Focus Group in which the relevant stakeholders took part. Throughout the evaluation period, the ToC was empirically tested, resorting to the Contribution Analysis to evaluate the contribution of interventions (inputs) to outcomes and impacts created.

The usage of these two methods in the evaluation process required, on one side, both qualitative and quantitative techniques in regard to the collection, treatment and analysis of information and, on the other, the active contribution of the relevant stakeholders along the evaluation process (through 27 interviews and 5 focus groups), enabling the triangulation of information.

The CA used in this evaluation resorted to matching methods that rely on the construction of a control group - composed of individuals who did not participate in the training initiatives - to match with the treatment group - composed of individuals who concluded their participation in the PT 2020 pieces of training. The matching was established according to observable characteristics (e.g. age, gender, employment situation, educational level and place of residency) which allowed the definition of a certain degree of proximity between the individuals who integrate the different groups. Following this rationale, the usage of the CA requires a set of characteristics that reinforce the comparability between the two groups to be observable before the occurrence of the treatment. By considering the distribution of the frequency of the training occurring throughout the years, the dynamic matching method was used, which consists of a year-to-year pairing according to which each treated individual can only be paired with individuals in the control group who displayed similar characteristics in the same period before the occurrence of the treatment.

The implementation of the CA required a wide range of databases. The characterization of the treated individuals resorted to the information available in the PT2020 Information System which regards the participants in the PT2020 training initiatives and was later complemented with data from the Integrated System of Information and Management of the Educational and Training (SIGO), which contains more detailed information on the individuals' identification and qualifications.

Once the treatment group had been identified, the aforementioned database was complemented with information regarding the individuals' employment and wage records, provided by the Institute of Informatics of Social Security which also identified individuals that could potentially integrate the control group - all the active individuals who had been registered in the Social Security between 2013 and 2019, which amount to 50 million registrations. The information on the educational attainment level of this group was collected from the payroll data (Quadros de Pessoal), through direct cooperation between the Institute of Computing and the Strategy and Planning Office of the Ministry of Work, Solidarity and Social Security (GEP). Both databases (i.e. the one regarding the treatment group and the one regarding the potential control group) were accessed through GEP's safe centre, where the Counterfactual Analysis was performed.

Once both groups had been identified (i.e. the treatment and the control group) the effects of the treatment were evaluated for a scope of three years succeeding to its completion, resorting to a set of variables related to employment. The evaluation of the treatment effect was conducted through econometric methods by comparing the two groups in each period.

When estimating the effects of the treatment, several variables were taken into consideration, namely the number of days worked, the dummy variables regarding the employment situation (i.e. having worked at least one day in the previous year and having worked during the full previous year), the monthly wage and the total annual wage. These variables were obtained through the Social Security database, in the second stage of data collection that took place following the identification of the two groups. Even though an analysis of the effects of the treatment on the quality

of the contractual relationships had been previously predicted, it was not possible to be conducted, as the entity holding the required data didn't provide the necessary information.

## 3. Conclusions

### Effectiveness

The majority of the indicators for the outputs of the PT2020 initiatives, which are mainly focused on the number of participations, reveal levels of implementation (in 2019) below the pre-defined goals for 2023, in a context in which some of the goals have already been revised downwards following the reprogramming of the Operational Programmes. **The physical implementation of the different Operational Programmes and TO highlights the difficulties resulting from the acceleration of the economic activity characterizing the period of evaluation.**

The reduction in unemployment limited the demand for training activities of unemployed and inactive individuals, more specifically for activities with a longer duration, such as EFA. This countercyclical behaviour is normal (and desirable in terms of unemployment reduction) and is proof of the automatic adjustment process of the economy, in general, and of the labour market, in particular, in response to the economic cycle. The delays in the implementation of the Operational Programmes also contributed to the observed implementation level.

PT2020 contributed to the increase in adults' qualifications and employability. The different categories of intervention supported a significant number of trainees, with more than 500.000 participations been in the scope of short-term training destined for unemployed individuals supported by PO ISE, more than 360.000 targeting long-term unemployed individuals (PO ISE), nearly 89.000 participants in CQEP/CQ and more than 27.000 participations in EFA courses under the PO CH, to which training initiatives promoted by the Regional Operational Programmes add to.

Due to the lack of completed operations, the majority of indicators for the results were not calculated by the Operational Programmes by the end of 2019. However, the data that supports the CA allows the measurement of results for certain participants - the ones who successfully concluded the training initiatives by the end of 2019. **By monitoring the path of the more than 200.000 participants who concluded at least one of their participations, it is observable that, during the year that followed the conclusion, nearly half were working for at least one day<sup>1</sup>, being 35% working for the full year.**

The CA proves the significant positive effects that participating in the training initiatives has on the employability of unemployed and inactive individuals (who reveal a probability of finding a job in the year following the conclusion of the training 18 times higher and 4 times higher in the second and third year than those integrating the control group). These effects are relatively heterogeneous among TO (in significance and magnitude) and at the regional level (homogeneous on what regards the direction/sign, but heterogeneous in terms of magnitude). While EFA courses, Vida Ativa and Vida Ativa DLD display significant effects in the short and medium-run, Formação Modular and Formação Modular DLD tend to display their effects on employability only during the year following the training.

Among the different regions, it is observable a difference in the magnitude of the effects (but not in sign), with greater effects displayed in the convergence regions, smaller in Lisboa and Algarve and non-significant in Autonomous Regions of Açores e da Madeira.<sup>2</sup> The differences in magnitude are mainly attributable to the differences in the TO implemented in each region (meaning it is influenced by the results of the TO), but are also related to the different sums of investment being channelled to each region, being the convergence regions the ones that naturally have a greater capacity to allocate investment to the policies in consideration and to invest in TO, of short and long duration.

The CA did not provide any evidence of a causal relationship between the participation in PT2020 initiatives and the changes in the wages of certified participants when compared to the control group.

### Efficiency

The duration of the training initiatives is a critical determinant of the unitary cost of the intervention. Among the different TO, the average unitary cost is 237€ per participant. The biggest investment regards the training initiatives of longer duration, namely the EFA courses (16 times higher than the average cost). In the initiatives of shorter duration, the costs vary between 96€ (Formação Modular) and 157€ (Vida Ativa). The average daily cost per participant is a variable that allows partial control of the bias associated with the duration of the initiatives. As a result,

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<sup>1</sup> Have payments made to the Social Security corresponding to at least one day of work.

<sup>2</sup> The non-significant results are mainly explained by the small sample size.

there is a greater balance among TO, with the EFA courses representing the greatest daily cost (9,27€), which is 4 times higher than the average global cost (2,50€).

Each certified participant costs, on average, 250€, which is a value higher than the cost per participant, since it is adjusted for the phenomena of withdrawals, non-approval and conclusion after the predicted date (reduction of the denominator). As the completion rates are higher for training actions of shorter duration, the increase in costs is smaller in TO included in IP 8.5 and 9.1. An analysis per TO displays heterogeneity among Operational Programmes.

The certificates are heterogeneous and are associated with different qualifications. The EFA courses are the ones generating more certifications with higher qualifications (in percentage) and the courses targeting the long-term unemployed are the ones that produce a greater proportion of lower qualifications. The TO displaying a greater tendency for certification of a higher educational level than the one initially held by its participants are the EFA courses and Vida Ativa DLD.

To ensure an additional job for at least one day through the TO EFA courses (maximum) costs substantially more than through the TO included in IP 8.5 e 9.1, especially in comparison to the cost of TO Formação Modular (minimum). However, considering the qualifying potential and the certification offered by EFA courses, it is noticeable that these tend to generate greater jobs.

The fundamental question posed by the efficiency analysis concerns resource allocation. Would it be possible to have obtained better results with a different resource allocation? The evidence obtained demonstrates that three different priorities were established which, despite displaying some common points, are not substitutable but rather complementary. For each of these priorities, there are adequate instruments that allow the satisfaction of the necessities characterizing the different targets.

The costs of each TO are differentiated but are aligned with the scope of the intervention: **structural increases in the qualifications imply a greater investment; unemployed of shorter duration require less targeted/specific interventions; long-term unemployed, usually displaying fewer qualifications, are allocated more resources than those who have more recently become unemployed.**

**The results reflect the relevance of the different TO, as they produce the intended changes for the beneficiaries with costs that are aligned with their respective scale.** A significant change in resource allocation (e.g. channelling investment only to the most efficient TO) would question the policy objectives regarding the different necessities.

## Impact

Between 2014 and 2019, the participation rate of the population in initiatives of lifelong learning increased by 0.9 p.p. achieving the 10.5% in 2019. A significant part is attributable to adults that took part in initiatives supported, being PT2020 responsible for the support of **61% of the training initiatives targeting the unemployed population in Portugal**. The contribution of PT2020 was **more relevant in 2014 and 2015** (in a context of greater unemployment levels) **among the individuals with educational attainment levels equal to the 1<sup>st</sup> and 2<sup>nd</sup> cycles of basic education, to the age groups beyond 35 years old, to women, to the Norte and Centro regions and within the certifications resulting from RVCC (Recognition, Validation and Certification of Competences) processes.**

The actions supported by PT2020 contributed to the increase in qualifications of unemployed and inactive individuals, namely in the increase in the number of individuals who hold an educational level of at least the 3<sup>rd</sup> cycle of basic education and secondary education. The volume of participation in the actions supported by PT2020 resulted in nearly 870.000 certifications, being 2.600 correspondent to the secondary educational level. These certifications corresponded to 1% of the increase in the number of individuals holding the secondary educational level between 2013 and 2019, among adults in Portugal. Adding up to this value are the certifications UFCD (Short-Term Training Units) of level QNQ (National Board of Qualifications) 3 and 4 (more than 34.000) obtained by individuals holding lower educational levels. However, in these cases, the certification is a partial certification, so there is no direct correspondence to the increase in the educational level held by these individuals.

Through the contribution towards the increase in employability of unemployed and inactive adults, **the initiatives supported contributed indirectly towards the increase of the employment rate in Portugal** (76.1% in 2019, surpassing the 75% goal set by Europe 2020 Strategy - EE 2020) observed between 2014 and 2019. Considering solely the certified individuals, nearly 100.000 had worked at least one day in the year following the conclusion of their training, from which 34.000 had worked for that full year (in contrast to a scenario of no exposure to the treatment in which the value would have been 12.000). The PT2020 actions also had a positive contribution toward the reduction of long-term unemployment. Among the participants of TO Vida Ativa DLD and Formação Modular DLD, 24.000 had worked at least one day in the year following the conclusion of the training.

Aside from the contribution towards the increase of qualifications and employability of unemployed and inactive individuals, the participation in training programs contributed to the achievement of the objectives of reintegration in the job market and to a greater social and professional inclusion of the individuals in this group.

## European Added Value

The intervention of the European Structural and Investment Funds (ESIF) in the scope of training initiatives for adults reveals a strong added value in the context of national public policy. **The scale effect of ESIF was critical to the achievement of the European targets in the Human Capital domain**, particularly concerning lifelong learning and the employment rate, concluding that in the absence of this relevant scale effect Portugal would not have reached the targets it had compromised to.

Without access to ESIF to promote training for adults, Portugal would have faced difficulties in implementing an effective policy to promote the increase in qualifications of its population, as it would have been more exposed to periods of interruption in the political and financial investment, and it would hardly have had the conditions to mobilize the investment required to surpass the structural challenge of the low levels of qualifications held by the population.

Another important dimension concerning the value-added regards the influence that European normative and strategic frameworks (transposed to the regulatory plan for the grants attributed in the scope of ESIF) to which an important evolution in the national policy of EFA is attributable, highlighting the more flexible training structures and the better alignment between these and the job market necessities and the territorial specificities.

There is also evidence of how the ESIF have impacted the national education and training policy targeted to adults, through the adoption of good practices/terms of reference regarding quality, the improvements in terms of efficiency and effectiveness resulting from the scale of the investments conducted and through the synergies created with other policy areas, such as the one responsible for the education of young people.

## Operative efficiency

The support provided through the structural funds in the scope of PT2020 results from the governance model and national decisions made by the Government. The greater political value attributed to the qualification of the adults is, in general, associated with a greater financial allocation targeting the area, which directly impacts the grants attributed and in a greater alignment with the necessities identified in terms of qualifications. The process of structuring PT2020 and specifically the TO regarding the qualification of individuals resulted from close cooperation between the relevant entities for the area, namely the IEFP and ANQEP, and the relevant governing entities, which promoted its alignment with the territorial necessities in terms of qualification as new grants are attributed through structural funds.

The articulation between the **Managing Authorities (MAs) of the Operational Programmes and between these and the entities responsible for the implementation and regulation of the supported initiatives is effective and adequate**, leveraging on the vast experience they have in the management and operationalization of ESIF. The instruments used for the articulation of these entities involved in the funding, implementation and regulation process of these supported initiatives are adequate, yet still have room for improvement, according to the listening process.

The **System of Anticipation for the Qualification Necessities (SANQ)** is an instrument relevant for managing the country's qualification necessities, enabling the recognition of the territorial priorities in terms of professional areas. However, it is relatively recent, targets mainly young people as opposed to adults, presents a bias towards the sectors and economic activities that dominate the national business fabric and still reveals an insufficient capacity of adaptability in periods with rapid changes in context.

The generality of the initiatives targeting the education and training in the scope of PT 2020 is characterized by combining basic/essential and transversal skills with relevant technical/professional skills, being noticeable that the former have been gradually assuming a more essential role in ensuring the adaptation of workers before different contexts and should be reinforced as transversal elements of the learning offer. The existence of instruments such as the CNQ was essential to the articulation between the skills needed for the socio-economic development of the country and the skills promoted and, subsequently, the grants attributed, and so have the Intermediate Bodies operating at the national level and with wide knowledge in this area.

**The lack of interest and motivation of adults to participate in training programs is a challenge to the adherence to the funding made available.** However, some differences must be highlighted among the group of unemployed adults, namely the direct relationship between the lowest education levels and the higher levels of resistance to adhering to and valuing training.

The adherence is negatively impacted by factors that are intrinsic to the individuals, namely the family and socio-economic context, the absence of knowledge regarding the lack of skills/qualifications held and its importance towards the improvement of living conditions, and the disruptions of poverty cycles. Additionally, there are also cultural factors contributing to it, since education tends to be a long process and, with the demand from the labour market and the persistence of the informal economy, it is still undervalued. The place of residence is also relevant to the adherence to training, with longer distances (to training centres) posing challenges to the participation in training programs.

The factors related to the characteristics of the individuals are only a part of the explanation of the barriers to the adherence to training initiatives, provided there are exogenous factors that are also relevant. Out of this universe, it is worthy of highlighting the political cycles characterized by the undervaluation of training and qualification of adults, which correspond to lower levels of adherence to training, particularly among the adults with lower qualifications. Additionally, the lack of a causal and unambiguous relationship between the frequency of training and the improvement of the working and wage conditions still poses a critical barrier to the adherence to training, persisting a strong belief, among the unemployed and other economic agents, that the effort required by the learning process does not necessarily translate into improved living conditions through work.

The adults with a lower level of qualification present, in general, multiple and cumulative disadvantages associated with the withdrawal from the educational system. It is a group of the population with low educational attainment and that displays a low or null willingness to attend training sessions, mainly driven by their previous poor and unsuccessful experience. Hence, it is a group of the population that is particularly difficult to mobilize towards an educational context, which reinforces their precarious labour situation, their low wages and, consequently, the poverty cycles they might be embedded into. In this context, **the greater the formality of the training initiatives, the more complex is the mobilisation of these individuals and the greater their risk of failure**. This is an approach previously tested and that displayed reduced effectiveness, leading to their withdrawal from the educational system.

## 4. Recommendations

### R1. Reinforce the demonstration effects and the visibility of the positive results produced through the different intervention typologies near the potential beneficiaries

The challenges in mobilizing the demand, being in the adherence to training initiatives or its conclusion, are intrinsically associated with the individuals' lack of motivation and perception of its benefits (particularly in the medium and long run) in a sustained professional context. It is essential to overcome these challenges to increase the contribution of these TO towards the qualification of the Portuguese population. Hence, it is important to:

- ▶ Continuously create awareness of the importance of lifelong learning, support the establishment of projects that value qualification, and share examples of success with the target group (grounding the interventions in an analysis of the paths pursued by previous graduates from the different TO).
- ▶ Consider the adequate forms of communicating this intervention at the different educational levels that compose the target group. The spread of this information should be conducted at the local community level and take particularly into account the most vulnerable territories.

### R2. Minimize the constraints to the demand

The lack of interest and motivation of adults to participate in training programs is the main constraint to the adherence to the available initiatives. The longest training program displays the highest withdrawal levels, particularly in periods characterized by greater labour market dynamism. The absence of a causal and unambiguous relationship between the frequency of training and the improvement of working and wage conditions and the lack of value attributed by the market to the acquired skills (in terms of wage) play a significant role in conditioning the adherence to training. To minimize these constraints, it is relevant to:

- ▶ Ensure close monitoring of the trainees throughout the training period to avoid withdrawal situations.
- ▶ Continue the orientation mechanisms made available by CQ, in cooperation with the employment centres, to ensure an adequate path that might contribute to preventing future withdrawal from training programs and RVCC processes, and to promote greater alignment between the necessities of the job market and the trainee's profile.
- ▶ Create instruments of articulation between the training and the hiring support mechanisms, providing companies with incentives to hire these trainees.



- ▶ Adopt less conventional learning models, more adapted to adults, that value the knowledge acquired through previous learning initiatives, with a smaller theoretical component, that is anchored to visual stimuli and that use more digital content.
- ▶ Reinforce the training component in the context of employment, that should favour more unconventional teaching methods (more adequate and motivating to this population).
- ▶ Promote soft skills within this population (creativity, teamwork and communication skills, along with flexibility and resilience), besides the technical skills and other competencies adjusted to the labour market necessities.
- ▶ Update the CNQ to adapt it to the real necessities faced by the companies and by individuals, creating a methodology that enables its rapid development and update.
- ▶ Re-evaluate the social support provided, in particular in the context of long-term training initiatives, to minimize the withdrawal situations or the low levels of adherence to these initiatives, mainly among the unemployed population with greater needs of qualification. This re-evaluation should take frameworks of similar instruments into account, be articulated with the relevant stakeholders and require a greater commitment from the beneficiaries on what regards the outcomes.

### **R3. Review the structure of courses with longer durations, such as EFA courses, to increase the demand in economic expansion cycles and implement initiatives to reduce the rate of withdrawal of trainees**

The adaptation of the structure of the training initiatives might be critical to increase the demand and reduce the rate of withdrawal of trainees (mainly in cases of training programs with longer duration). Changes might include an increase in the proportion of courses taught through digital platforms and the reinforcement of training in the work context. This process should follow the exercise of recognizing the profiles composing the different segments of the demand for these training programs and the careful identification of the factors that are contributing to the withdrawals of participants. Among the different measures that could be implemented, it is important to:

- ▶ Create awareness of the effort the program requires to increase the participants' commitment throughout the process.
- ▶ Invest in processes capable of continuously improving the educational and professional training offer.
- ▶ Adapt the training offered to the necessities of the firms and sectors through the close involvement of the relevant stakeholders in the design of the qualifications and their development.
- ▶ Develop communications strategies that should target the unemployed population and provide evidence of the utility of training and education, while including concrete examples of its benefits.
- ▶ Consider where the adults stand relatively the benchmark of the training program, to adapt, whenever it is possible, the content to the necessities of the participants (particularly for training initiatives of longer duration such as the EFA courses).

### **R4. Ensure that the SANQ will continue to be the relevant national instrument for the management of the training necessities of the population**

To guarantee the SANQ will continue being the relevant national instrument for the management of the training necessities of the population it is important to reinforce, in the context of its permanent evaluation, a strong involvement of the social partners, sector-oriented associations and labour unions, education and training promoters, the scientific community, regional entities that enable the development of the system through the anticipation of the demand for skills and qualifications, to have the training offer responding to this demand, avoiding previous weaknesses of the system. In the scope of recommendations, it is important to adopt the following actions:

- ▶ Guide SANQ towards the qualification, learning and identification of priority professional areas of the adults, similar to what it has been doing for the younger individuals.
- ▶ Diversify the training offer, prioritizing not only traditional areas which lack workers, but also emerging sectors with intrinsic regional potential.
- ▶ Ensure effective adaptability of SANQ to periods of rapid changes in context, enabling the system to periodically support decisions for the adjustment of the operationalization of OPs.

**R5. Ensure the monitoring system of the TO concerning the training of adults produces information capable of supporting decision-making processes on time**

The continuous monitoring of the TO concerning the training of adults is essential to support the decisions of the MA regarding the management of the interventions. The existence of the MA's autonomous information systems and of a wider PT2020 system more centralized in AD&C does not allow the required and timely articulation for the production of standardized information which is important to support management at a level wider than the OP.

Hence, it is particularly relevant to structure a monitoring system that integrates the indicators and variables required for the physical and financial monitoring of the TO and that allows reasoned management decision-making processes in transversal matters to be made by the OP that are financing the initiatives. This system should, ideally, be systematically updated. The monitoring system should support the internal and external spread of information regarding the implementation and the outcomes of the supported initiatives. Naturally, its creation should combine the production of the required information with a moderate production and maintenance cost, which can be ensured through an effort for its simplification and through the usage of computerised processes that enable real-time data reports.

**R6. Develop a monitoring framework with indicators grounded in a process-outcome approach to quantify and characterize the direct effects of training**

The quantification of the produced outcomes depends heavily on the quality and extent of the available information. Certain OPs have defined a reduced set of outcomes concerning the participants' information. The monitoring system that is hereby recommended should include, for each TO, a set of indicators about the trainees' path in the period following the training. These benchmarks could have a common structure grounded in key indicators and additional modules as a function of the nature/duration of the programs. These modules should be composed of a set of objective variables (e.g. work situation; frequency of new training initiatives) and subjective variables associated with the trainee (e.g. degree of satisfaction with the job; current professional situation). It should also be guaranteed a greater articulation among the entities holding the information and the entities responsible for the management of ESIF.

**R7. Deepen the work conducted in the scope of harmonization of procedures and Exchange of good practices in the operationalization of the OP and TO, involving the relevant stakeholders**

Previous experiences and different operational models generate evidence that should be debated and shared to ensure greater effectiveness and efficiency in the quantitative and qualitative promotion of employment and of regional development (which should ultimately impact the living conditions of the local population). Hence, it is important to promote collaborative practices among the entities at their different levels, deepening the work that had been previously conducted by the Rede para a Educação e Qualificação (Network for the Education and Qualification), where an open and active debate among the relevant entities and regarding the best/worst practices on the operationalization of TO should take place. These meetings should integrate the relevant stakeholders for the themes in debate, besides the entities that are to integrate the future Network (where the MAs play a crucial role) after the current period of programming.

**R8. Minimize or eliminate the constraints of the operationalization to potentiate the efficiency of the actions supported by PT 2020 in the scope of the training targeted at adults**

To minimize or eliminate these constraints in order to potentiate the efficiency of the operations supporter by PT2020 in the scope of the training targeted at adults it is relevant to:

- ▶ Ensure greater territorial decentralization capacity in regards to the management of the grants, without compromising the efficiency generated by the mobilization of tender opening notices (AAC) that are common to the different OP, provided the importance of articulating sector-oriented policies at the regional level.
- ▶ Develop governance frameworks supported by social partners that are capable of promoting the articulation and flexibility of the operationalization mechanisms, ensuring the consistency of the OP and promoting timely responses to the economic and technology-driven changes.
- ▶ Continue the work developed in simplifying and sharing the existing support mechanisms, with regard to the offered training initiatives.

- ▶ Guarantee greater flexibility in the minimum number of participants required per training initiative, according to the territorial specificities and the area of training.