

Evaluation of the Implementation of **Azores 2030 Programme**

Executive Summary

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Purpose and Scope

This report, prepared by the Centre for Regional and Urban Studies and Development (CEDRU) for the Managing Authority of the AZORES 2030 Programme, constitutes the mid-term evaluation of the AZORES 2030 Programme.

As established in the Common Provisions Regulation for European Funds and in the Programme Evaluation Plan, approved by the Monitoring Committee in November 2023, this evaluation aims to determine whether the programme is on track to achieve its objectives and to assess the need for potential adjustments. The analysis focuses on the response to the programmed needs, the verification of consistency between interventions and the adequacy of management mechanisms.

The document is structured in six chapters, supplemented by annexes with additional relevant information. The contents are the result of the analysis of documentation and statistical data, as well as interviews with entities involved in the programme's management and surveys of beneficiaries, whom the evaluation team thanks for their collaboration.

The AZORES 2030 Programme, funded by the European Regional Development Fund (ERDF) and the European Social Fund Plus (ESF+) for the period 2021-2027, aims to promote the sustainable development of the Autonomous Region of the Azores (ARA). This instrument covers several areas of intervention, from smart economic growth and the promotion of skilled jobs to social cohesion, sustainable mobility, adaptation to climate change and the modernisation of public administration.

The architecture and strategic options of AÇORES 2030 are aligned with the priorities set out in the Portugal 2030 Strategy, which proposes to *"recover the economy and protect jobs, and make the next decade a period of recovery and convergence for Portugal with the European Union, ensuring greater resilience and social and territorial cohesion"*. This vision is based on four main agendas: people first (demographic balance, inclusion, reduction of inequalities); digitalisation, innovation and skills; climate transition and resource sustainability; and external competitiveness with internal cohesion.

The Programme is also based on European guidelines, including the Commission's communication on the Outermost Regions (ORs), national strategic documents and regional sectoral policies, such as the Research and Innovation Strategy for Smart Specialisation of the Autonomous Region of the Azores (RIS3 Azores). Complementarity and the creation of synergies with other instruments such as the PRR, the Cohesion Fund and INTERREG MAC were taken into account in the strategic definition of the Programme, ensuring consistency in interventions and avoiding double funding.

The strategic objectives of AÇORES 2030 include: promoting economic development, research, innovation and digitalisation (OP1); boosting environmental sustainability (OP2); developing mobility (OP3); promoting social cohesion strategies (OP4); and fostering territorial cohesion (OP5). The programme's scope allows it to cover various target groups, including citizens, businesses, the educational community, the University of the Azores, IPSS, agents of the Azores Scientific and Technological System, regional and local public administration, employed and unemployed people, marginalised communities, vulnerable people, the elderly and young people.

Objective of the Evaluation and Methodology

The primary purpose of this evaluation is to assess, still in the initial phase of implementation, *"whether the Programme is on track to achieve its policy objectives and specific objectives, and whether adjustments are needed to ensure that these objectives are met"*. The results will allow for *"the timely incorporation of programmatic adjustments, particularly in the mid-term review and in the Programme's implementation processes"*.

This objective unfolds into four fundamental dimensions:

- Response to programmed needs: Assess the extent to which the Programme responds to the demands it aims to address, taking into account any contextual changes;

- Coherence of interventions: Assess whether the implementation of the Programme ensures coherence between the programmed interventions and between these and other policy instruments with converging objectives;
- Adequacy of strategic and operational management: Assess the adequacy of management mechanisms, including the monitoring and evaluation of intervention instruments, and the adequacy of the instruments created to ensure high levels of effectiveness and efficiency in implementation;
- Potential for achieving objectives: Assess, based on the pace of implementation of the programme and the projects supported, whether implementation ensures the necessary conditions for achieving the defined goals and established targets.

Two main criteria stand out in this assessment:

- Effectiveness: Analyses the extent to which the intended objectives and results are being achieved, focusing on the relationship between the *outputs/outcomes* produced and the targets set;
- Operational efficiency: Examines the adequacy and optimisation of the processes and resources mobilised in the implementation of the programme, including the quality of administrative procedures, the capacity to mobilise qualified demand and the effectiveness of the mechanisms for selecting operations.

The evaluation of the AZORES 2030 Programme is structured around five main Evaluation Questions (EQ), subdivided into more specific Evaluation Sub-questions (ESQ), namely EQ1: Effectiveness and efficiency of administrative procedures and information systems; EQ2: Capacity to mobilise the desired demand; EQ3: Capacity to select the most relevant projects; EQ4: Adequacy of indicators for management, monitoring and evaluation; EQ5: Prospects for achieving the Programme's goals and objectives.

The evaluation of the AZORES 2030 Programme is based on an integrated, pluralistic methodological approach that combines various methods to capture the complexity of the issues involved. This methodology values dialogue and stakeholder participation in all phases of the evaluation process.

The study is based on the collection and analysis of quantitative and qualitative data, using techniques such as document analysis, interviews, surveys and *focus groups*. These techniques are structured according to the evaluation dimensions: operational efficiency (QA1, QA2, QA3) and effectiveness (QA4, QA5).

The evaluation uses Action Theory and Programming Theory as theoretical elements to structure the responses to the evaluation questions. For specific types of operation, such as "*Coastal Protection and Defence - Material Actions*", different methodological approaches are developed.

To carry out the study, interviews were conducted with the programme's management structures and other entities involved in its implementation (Management Authority, DRQPE, DREC, DRCID and DRAAC), a survey was launched among beneficiaries, obtaining 110 valid responses (response rate of 21.9%), and two *focus groups* were held, one with entities involved in the management of the Programme and the other with beneficiaries.

Main Conclusions

The responses to the evaluation questions allowed us to identify the following four cross-cutting conclusions:

- **Implementation constrained by structural constraints** - AÇORES 2030 faced significant delays due to systemic constraints: a one-year gap between the approval of the Partnership Agreement (July 2022) and the first notices (August 2023), difficulties in adapting the Information System and competition with the PRR. As a result of these factors, the implementation rate as of 31 May 2025 was 7.3%. Still, the programme led among the PT2030 regional programmes (national average: 3.0%), demonstrating that the delays are predominantly systemic and not specific to the region.

- **Weaknesses in administrative procedures and technical capacity** - Three main weaknesses were identified: excessive procedural deadlines (48% of beneficiaries consider them to be highly restrictive), bureaucratic complexity (44.4% report obstacles) and insufficient qualified human resources. These weaknesses affect promoters asymmetrically, penalising smaller and less experienced ones more. The consequences are evident in the 26.7% of beneficiaries who identify bureaucratic obstacles as constraints on the pace of financial implementation.
- **Pronounced heterogeneity between areas of intervention** - There is a marked difference in performance between areas of intervention. Areas such as scientific research and entrepreneurship recorded demand exceeding 300% of the allocation, while others, such as "young investors", recorded only 10%. In the contractualisation of indicators, some thematic areas achieve 99-100% of their targets, while others fall below 5%. This heterogeneity reflects different structural factors and requires specific adaptive management strategies for each domain.
- **Potential for recovery based on regional experience** - AÇORES 2030 shows potential for recovery based on the experience of PO AÇORES 2020. Currently, 75% of beneficiaries expect to execute 95-100% of contracted projects, and 91-95% rate the programme's indicators positively. The realistic scenario projects an 80% implementation rate by 2029, conditional on the implementation of corrective measures across three fronts: administrative management, promoters' technical capacity, and coordination among financing instruments.

Eighteen specific conclusions (SC) were also identified from the detailed analysis of the evaluation questions (SQA). These questions are structured around two main dimensions: Operational Efficiency (SQA1-SQA4), which examines administrative procedures, demand mobilisation, selection processes and the indicator system; and Effectiveness (SQA5), which assesses the achievement of programme objectives and targets.

In the Operational Efficiency dimension (SQA1-SQA4), it is noted that the Funds Desk represents an innovation that has been well received by beneficiaries (CE1), but lacks support materials to prevent bottlenecks as the Programme reaches a higher level of implementation intensity. Simplified Cost Options, despite their potential to reduce bureaucracy (CE2), still require adaptation and specialised training, particularly for less experienced promoters. These promoters face additional difficulties (CE3) that compromise equity of access, mainly due to the complexity of the forms and the shortage of human resources.

Demand mobilisation (CE4) is overall positive, despite marked heterogeneity across areas, while the Notice Plan shows significant deviations from the forecast (CE5), influenced by regulatory constraints and competition from the PRR. At the same time, the evaluation highlights substantial delays in the analysis of applications (CE6), which directly impact the pace of implementation. The selection model attempts to strike a balance between national guidelines and regional adaptations (CE7), although regional autonomy remains limited. The evaluation procedures are robust (CE8), but dependence on highly specialised panels and excessive bureaucracy continues to cause bottlenecks.

Another set of conclusions highlights structural constraints on funding (CE9), stemming from rigid budgets and inflexible criteria, that make it challenging to support relevant projects in the most fragile territories. Monitoring faces significant limitations. Thus, despite the strategic alignment of indicators (CE10), the existence of zero intermediate targets reduces monitoring capacity, and the lack of sensitivity of indicators to structural changes (CE11) compromises the reading of long-term impacts. Even though beneficiaries evaluate the indicator system positively (CE12), they identify the need for regional adaptations.

Concerning financial management and compliance with the n+3 rule, the risk is under control in the short term but becomes critical in the 2027-2028 horizon (CE13), requiring greater predictive vigilance. Despite the still-incipient implementation (CE14), there is potential for recovery based on the experience of the 2014-2020 period, reinforced by robust historical implementation levels. The heterogeneity between domains is particularly significant (CE15), revealing sharp contrasts that affect operational coherence and exacerbate differentiated risks. At the same time, beneficiaries identify weaknesses in administrative procedures (CE16), which continue to be a significant obstacle.

Communication and capacity building emerge as critical areas (CE17). The lack of practical guides and structured content increases dependence on informal contacts and undermines the quality of applications, especially among less experienced entities. Finally, the evaluation recognises the positive evolution of institutional learning capacity (CE18), highlighting adaptive correction mechanisms that have enabled judicious adjustments, reprogramming and improvements inspired by experiences from previous cycles.

Key Recommendations

The 11 recommendations of the study (R1-R11) are structured around five strategic areas of intervention to optimise their implementation. Each recommendation includes specific operational measures, the responsible implementers, and a phased timetable: Urgent (0-4 months), Priority (4-8 months), Structuring (8-12 months), and Consolidation (12-18 months). The recommendations are based on the conclusions identified and aim to correct critical constraints, capitalise on potential and strengthen the Programme's implementation capacity. In this context, the main recommendations of the AZORES 2030 Programme Evaluation converge towards an overall improvement in the Programme's efficiency, technical capacity and territorial adaptation.

Firstly, there is an urgent need to speed up the merit analysis of applications (R1), strengthen teams, simplify procedures, and ensure greater technical robustness to avoid delays that compromise compliance with the n+3 rule. This recommendation aims to address constraints already identified and to provide faster, more consistent decisions. At the same time, implementing a predictive early warning system for the n+3 rule (R2) is considered essential. This mechanism should continuously monitor the risk of non-compliance, build contingency scenarios and automatically activate corrective measures whenever significant deviations are detected. This will prevent funding losses at a critical time, especially in 2027-2028.

Another priority is to strengthen financial implementation (R3), capitalising on experience from the previous cycle and promoting close monitoring of critical operations. The goal is to establish a progressively more robust implementation pace, ensuring that beneficiaries and management structures can translate approvals into concrete results in the Region.

In terms of capacity building and communication, the evaluation recommends modernising digital infrastructure and administrative procedures (R4) and developing differentiated communication strategies (R5). This includes simplifying forms, creating dynamic FAQs, providing educational materials and targeted campaigns by beneficiary profile to reduce barriers to access and improve the quality of applications.

It also highlights the importance of optimising Simplified Cost Options (R6) through pilot programmes, specialised training, and methodologies tailored to promoters with lower technical capacity. At the same time, it is recommended that the technical capacities of managing entities and beneficiaries be strengthened (R7), either through structured recruitment or through continuous training programmes and partnerships with the University of the Azores.

In the area of territorial cohesion, the evaluation highlights the need to adapt management criteria and practices to regional specificities (R8). This involves adjusting eligibility criteria, managing imbalances between areas of over-demand and under-demand, considering territorial characteristics and preparing mid-term reprogramming to correct structural asymmetries.

In terms of governance, it is recommended to institutionalise adaptive learning mechanisms (R9), create databases of lessons learned, promote regular meetings between the MA and IB, and establish early warning systems for new constraints. Similarly, it is proposed to strengthen methodological robustness and its while maintaining procedural efficiency (R10), with permanent panels of evaluators, standardised grids and simplified technical opinions with objective *checklists*.

Finally, improving the system of indicators and monitoring (R11) is considered essential to capture structural impacts, harmonise European and regional metrics, and ensure adequate follow-up mechanisms. The introduction of complementary indicators, warning systems for deviations, and graduated consequences for non-compliance aims to strengthen the Programme's capacity to deliver transformative, measurable results.



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