

Quaternaire Portugal

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From strategy to action: building up development

The sentence above, that has guided Quaternaire Portugal in more than twenty years of activity, is an excellent opportunity to introduce this newsletter, a new communication link of the company with its employees and its external environment.

In fact, the newsletter is one step more to launch Quaternaire's new image and communication policy, which occurs in a very particular moment of the consultancy activities that are predominantly oriented towards the public sector and the universe of development in general.

For reasons related with the impact of the financial rescue of the Portuguese economy and with the radical transformation of its financing model, nowadays the consulting market is crossed by a deep recession. However, we've always believed that it's precisely in these moments that the clarity of the projects, and of the missions and values which orient them, is most needed.

From strategy to action is an operation that merges with the mission, principles and values of Quaternaire Portugal. The core of this operation is the building of socially useful bridges between knowledge (scientific, technical, strategic, of experience and learning) and the decision-making process, namely of public policies. The value of the competence, with which this operation is implemented, becomes a crucial resource to manage and facilitate processes like the one currently faced by the Portuguese society and that certainly will mark our medium-term development. The consultancy, as we understand and practice it, is not a redundant input.

The objectives of efficiency, effectiveness and equity that should orient the management of this challenging transition require the increase of the strategic knowledge, especially understood as an instrument for transparent decision making, subject to scrutiny and evaluation. We understand the transformation of knowledge into a guide for action as a partner in social change processes. We are convinced that, among other objectives of communication, this newsletter that we are now beginning to publish will help to make this idea clearer and more widespread.



António Manuel Figueiredo
President of the Board of Directors

Starting projects

Technical Guide for the Coastline of Azores

QP has begun working on the preparation of the Technical Guide to Coastline of Azores, project ordered by the Regional Department for Territorial Planning.

This project falls within the European Community initiative designated LITOMAC - Synergies and Cooperation in the Establishment and Sustainable Planning of Coastal Areas of Macaronesia, which aims "to establish coastal areas defined in terms of a set of environmental and spatial variables adapted to the uniqueness of each island", that may constitute as fundamental areas in the management of coastal areas of the Azores, Madeira and Canary Islands.

In this context it is important to debate on the concept of coastal zone in the Azores islands, considering the challenges faced by its integrated management, raise awareness and provide information on the coastal zone. Two documents will be produced aimed to different target audiences: first, a technical and scientific decision support document, also designed for planning technicians and others working on these matters; and a second one, with more transversal nature, directed to inform citizens in general.

More info: <http://www.litomac.com>

Studies for Montado (oak grove) Landscape Mapping and Description

The Montado Landscape is the thematic focus of one of the PROVERE (Programme for the Economic Enhancement of Endogenous Resources), confining the Portuguese region of Alentejo. This Programme aims to underline the relation between the strategic and economic importance of this endogenous resource and its cultural and distinctiveness value and touristic potential. In this sense, one of the main objectives of the Programme is to support the relationship between the economic competitiveness of the cork sector and the safeguard and valorisation of its exclusive landscape.

The distinctiveness of Montado Landscape of inner Alentejo region, in its different cultural, social, economic and environmental issues, justifies a deep research which can be in agreement with the rational of UNESCO classification of universal heritage.

Therefore, the Alentejo's Regional Tourism Body decides to make a contract with Quaternaire Portugal in order to achieve the Technical Studies for Montado's Mapping and Description as the bases of a classification process. The studies must assure an interdisciplinary work in order to answer to the transversality of this agrarian landscape.



Heritage Interpretive Centre of Afurada

Started the installation of the Heritage Interpretive Centre of Afurada, a settlement placed at the mouth of the Douro, where a community mostly linked to fishing lives.

Quatenaire Portugal will coordinate the installation of the functional areas of the Museum (after being responsible for drafting the Base Programme). Museography has the participation of the firm Cariátides and Atelier 15 is the responsible for the architecture project. It is undeniably the most opportune time to launch a memory space that allows to combine and reconcile the heritage, the historical root and identity of the place of Afurada, its people and their traditional ways of life, with a set of profound changes (urban, cultural, economic and social) taking place in this coastal territory in a process of urban regeneration.

The initiative comes from the Douro and Leixões Port Administration which funded the rehabilitation of five warehouses of fishing equipments. The equipment will be managed by Águas e Parque Biológico de Gaia, a public sector company. The North Regional Operational Programme funds the installation of the contents of the Interpretive Centre.



Interim Evaluation of the Programme RUMOS

Following other studies in the field of ESF (European Social Fund) application to Autonomous Regions, it was recently contracted with IDR (Madeira Institute for Regional Development) the elaboration of the Mid-term Evaluation of the Operational Programme for the Valorisation of Human Potential and Social Cohesion in the Madeira Region (RUMOS Programme).

Quoting the Terms of Reference for the study, "the mid-term evaluation of the RUMOS Programme is completely focused on the evaluation of outputs, results and impacts of the interventions supported until the moment of the evaluation". The evaluation exercise also includes the design of a set of impact indicators and the identification of needs for programme's adjustments and of initiatives that can be considered as good-practices.

The evaluation methodology is based on a multi-method strategy as well as on the triangulation of sources and in the participation and auscultation of the main agents and beneficiaries of the Programme.

Completed and ongoing projects

Monitoring of Matosinhos School Network Chart

Five years after its initial formulation, this study assesses the on-going implementation of the local school network chart of Matosinhos, as well as the recent education dynamics in the Municipality. Its objectives are threefold:

- Assessing the extent to which implementation matches the initial expectations;
- Evaluating the qualitative evolution of the Municipal educational system, and whether it fits the present needs;
- Framing the local educational evolution vis-à-vis the targets of the National Educational Programme 2015

This study was performed with the close support and participation of the Municipality technical staff, as well as the representatives of the local basic, secondary and professional schools.

Interim Evaluation of the Fisheries Operational Programme 2007-2013 (PROMAR)

In consortium with the Institute for Social and Economic Studies (IESE), Quatenaire Portugal participated in the Study on Interim Evaluation of PROMAR, a public policy instrument for the sectors of fisheries and aquaculture, funded by the European Fisheries Fund.

This evaluation, presented in June 2011 to the Managing Authority and Monitoring Committee of PROMAR, was focused on two major themes: one of operational nature, designed to assess the management system and introduce the required adjustments at this level; and another of effectiveness, assessing if the Programme's intervention is or will produce the desired effects.

From a review of the social and economic context and the evolution of European and national policies and guidelines for the sector, and through detailed analysis of management and information systems and levels of material and financial implementation of each line of intervention of the Programme, the study makes a series of recommendations in the fields of (i) overall and specific strategic orientations for the main areas of intervention, (ii) the improvement of the governance, management and information systems and (iii) on gender equality and environment.

Urban Development Funds for Portugal

Following the establishment of the JESSICA Holding Fund in Portugal, the European Investment Bank (EIB) and the management bodies signed contracts for the creation of three Urban Development Funds (UDF), to support urban regeneration in some regions of the country.

JESSICA Fund was established through agreement between the Portuguese State and the EIB and is endowed with 130 million euros, financed by the ERDF (Continental Regional and Territorial Enhancement Operational Programmes) and the Directorate General of Treasury and Finance, and may also be reinforced under each UDF by fund managers contribution.

The three funds are managed by BPI- Banco Português de Investimentos (64 million euros in the intervention areas of the Regional Operational Programmes North and Alentejo), by the consortium CGD- Caixa Geral de Depósitos / Institute of Housing and Urban Renewal (51 million euros to intervention areas of the Centre Regional and Territorial Enhancement Operational Programmes) and by Tourism of Portugal Institute (15 million euros in the intervention areas of the Regional Operational Programmes Lisbon and Algarve).

UDF are financing mechanisms that support regeneration and urban renewal interventions, promoted both by public or private entities, as long as framed in sustainable urban development plans.

This is a very relevant field of expertise within the services provided by Quatenaire Portugal. The company's experience has been achieved in the development and monitoring of numerous action programmes for urban regeneration partnerships and networks for urban competitiveness and innovation, strategic programmes for urban revitalisation, territorial planning instruments and other projects for municipalities and urban regeneration societies.

<http://en.quatenaire.pt/Services/Urban-Projects-and-Policies/Urban-Regeneration-and-Rehabilitation-Operations>

http://ec.europa.eu/regional_policy/thefunds/instruments/jessica_en.cfm

<http://www.fundojessicaportugal.org/>

Local Strategy Barcelos 2020

The technical work of designing the Local Strategy Barcelos 2020 has been completed with the public presentation held in Barcelos on July 2011.

This is a strategic plan for the territory and the municipality of Barcelos, in Northwest Portugal, characterized by strong urban-rural duality and heavily industrialized economy, keeping a strong agriculture sector. The works were supported by strategic planning traditional tools (analysis of statistical information and desktop research, dynamic SWOT matrix, VRIO analysis), combined in a process where interaction with local and regional institutions was decisive (about 100 entities participated in interviews or panel discussions).

The plan proposes clusters of projects that make up both proactive and defensive approaches, for the forthcoming period of major economic, financial and social constraints in Portugal and in Barcelos. The vision and strategic objectives proposed value the resilience of this territory, its diversity, creativity and entrepreneurship, aiming a sustainable development model.

The documents are available on the website of the municipality of Barcelos

Vol1. - Diagnosis

<http://www.cm-barcelos.pt/downloads/Barcelos2020Vol1.pdf>

Vol2. Strategy

<http://www.cm-barcelos.pt/downloads/Barcelos2020Vol2.pdf>



Urban Regeneration Strategic Programmes for Braga Historic Centre and South Braga Area

In November 2010 the Municipality of Braga, in accordance with the new legal framework for urban regeneration (Decree-Law 307/2009, October 23), made the decision to initiate the process of transformation of the Critical Areas for Urban Recovery and Redevelopment of the Urban Historic Centre and the Sítio dos Galos area (afterwards called South Braga area) in Urban Regeneration Areas and undertake to the drafting of their Urban Regeneration Strategic Programmes (URSP). It was up to **Quatenaire Portugal**, in a consortium with the firms SOP-SEC, S.A. and Rui Passos Mealha Arquitectos, Lda., to coordinate the development of these Programmes.

The URSP for the Historic Centre lays the foundations for a new strategy for regeneration and revitalisation of Braga downtown, with the year 2021 as the horizon, and advocates the raising of private funding and encouragement of the rental.

As for the URSP for the South Braga area, it deals with coordination of the planned investments for Monte Picoto and the rehabilitation of East River, including proposals for the reinstatement of the Sítio dos Galos area, in the southern part of Avenida da Liberdade.

These programmes also set the preliminary base lines for each of the Urban Regeneration Areas as well as its model of execution and management.

On September 8, 2011, the Braga City Council unanimously approved both Urban Regeneration Strategic Programmes. In October 2011 the Housing and Urban Rehabilitation Institute issued a favourable opinion on both programmes.



Study of the Vocational Training and Employment Sector in Cape Verde

Since May 2011, Quatenaire Portugal is carrying out a diagnosis study on the vocational training and employment sector in Cape Verde. The general objective is to characterise the main organizational and functioning attributes of the sector and to diagnose the virtues and insufficiencies of its performance. It also aims at listing a set of recommendations addressed to its future development.

The study framework is to become an analysis, reflection and proposal antechamber to the development of new sectoral plans and programmes in the area of human resources development. Therefore, the emphasis is set not only on the programmatic dimension of the approach but also on the institutional and legal aspects.

In addition to this, the perspective that the analysis should contemplate the interaction dynamics between the subsystems that compose the vocational training and employment sector is highlighted bearing in mind that this interaction has been the background of political impulse in this sector in the last decade.

The financial bail-out agreement (TROIKA memorandum) and monitoring

The document that rules the financial bail-out of the Portuguese economy has raised a debate that is not as broad as desired. Some of its options are certainly controversial and the configuration of alternatives would require a more reasoned and informed debate. That is not the space that we would like to dedicate it. But it is important to highlight one aspect that has been missed by the large majority of the observers. Assuming that the agreement is fully implemented, it will implement instruments and monitoring systems that, we believe, will revolutionize the monitoring conditions and scrutiny of public policies and the use of public resources in Portugal. If these mechanisms aren't just "window dressing" and are effectively available for a collective scrutiny, then we will have a huge leap in terms of transparency and "accountability" of public affairs. Maybe this leap was possible without a bail-out of this nature and without the costs of a so severe adjustment. But we must recognize that, if that happens, we will be facing an unexpected by-product that it would be relevant to transform into a standard procedure.

Reviewing of the Municipal Land Use Plan of Funchal

Quatenaire Portugal is involved, as the consortium leader, in Funchal's municipal land use plan, a spatial planning instrument which defines the territorial development strategy for the whole municipality and structures the way in which the territory can be occupied and transformed.

The planning process, which started in August 2010, is now in its second phase, as the characterization studies finished in July 2011. Quatenaire team covers the executive coordination of the studies as well as the social, economical, urban and biophysics components. This plan occurs in a particular moment in Madeira's development, in which the region faces high requirements in terms of competitiveness, innovation, incorporation of knowledge and sustainability. In order to respond to this challenging project, the team has presented a new and creative approach to planning methodologies, certain that it will lead this new cycle of municipal planning.

Participation in technical and scientific meetings

“Structural change and social cohesion: elements for the future of the Portuguese economy”

António Manuel Figueiredo

in Conference *Portuguese Economy: an economy with a future*, September 30, 2011, Economy with Future Network, Calouste Gulbenkian, Lisbon, Portugal

This paper explores the often overlooked evidence that the Portuguese economy is living an intense and slow period of structural change in order to adapt itself to the new directions of globalization. This happens in a particularly unfavourable and unique context in the OECD universe: the misunderstood extension of a large international recession, the crisis of governance model, the revealed inconsistencies in the Eurozone and the unsustainability of the funding model. The social dimension of development (growth) is recovered as an intrinsic element of development itself and not as a simple product of good conscience for the regulation of markets in crisis. Taking into account the unfavourable nature of the starting conditions (the actual and potential social exclusion, the inequality, the not yet complete job destruction, the territorial marginalization), the inclusive social dimension surely requires new contents for the Portuguese model of growth (for qualification, for social cohesion, for knowledge, for a more extensive mobilization of resources in the territory), building what some of us refer to as the new development model. And, no less important and certainly more controversial, requiring new patterns of public spending, thereby reformatting public choices.

More info: <http://www.economiacomfuturo.org/pages/conferencia.php>

“The sustainability of cultural equipments: the hard management of needs and opportunities”

José Portugal and Pedro Quintela

in *Seventh Meeting of Museums from Portuguese Language Countries and Communities*, 26 and 27 September 2011, the Portuguese National Committee of ICOM, the Orient Museum, Lisbon

This communication is a reflection on the growing importance of a consistent programming and management of cultural structures, capable of overcoming opportunities management and show their relevance and sustainability – an approach particularly relevant, given the current times of crisis in which, inevitably and desirably, it would enhance the selectivity in the funding of cultural projects. It's important to guarantee that this current need to print clarity, objectivity and sustainability in the design of cultural policies doesn't reduce the support criteria to cultural projects and structures to purely financial and economic ones. In this debate the authors take as example the current launching process of a new *memory space* dedicated to the place of Afurada (Vila Nova de Gaia, Portugal) – its people, territory, and their traditional ways of life –, which includes the definition of the management and programming structure and also the institutional “animation” of this new cultural place. In the paper, it's analysed the relevance and objectivity of the purposes of the Afurada's Memory Space, and are also presented and discussed some possible ways to build the future sustainability of this kind of cultural structures.

More info: <http://www.icom-portugal.org/cplp/>

“IMOD Project: opportunities and challenges for new intersections between urban planning, culture and heritage, and economic development”

Elisa Pérez Babo and Pedro Quintela

in SICYUrb – Second International Conference of Young Urban Researchers, 12-14 October 2011, CIES / ISCTE - Lisbon University Institute, Lisbon, Portugal

Located at Santo Tirso's city, the ancient *Fábrica do Teles* represents today a vivid memory space of the traditional industrial culture in the Ave Valley area (in the northern region of Portugal). Thanks to the *iMOD (Innovation, Fashion and Design) Project* – a project that results from a partnership between the local municipality, an arts and design school and some other institutional partners in the textile industry sector - this old textile factory, deactivated for more than two decades, finds an opportunity to create, in the city of Santo Tirso (Oporto Metropolitan Area) a *new intercrossing space* between industrial and archaeological heritage, innovation, creativity and urban sociability. On the other hand, the *iMOD* it's a project that integrates a broader urban and environmental rehabilitation operation in the riverside area of Santo Tirso (ongoing) and takes inspiration on the “cultural quarter” concept, in order to integrate a range of new functions at the *Fábrica do Teles* - which include, among others, business incubation of technological and creative components, specially related with fashion; artistic and cultural activities; and the dynamization of new places of enjoyment and consumption related to arts and creativity - within a framework of a sustainability relationship between the city and the river. In this communication, the authors explore these different dimensions of this *iMOD* project. Also, from the analysis of this particular project, it's discussed the new policies of urban regeneration in Portugal which, in line with current international trends in urban planning, seek to develop new forms of use and appropriation - social, economic and symbolic - of these old industrial buildings.

More info: <http://conferencias.cies.iscte.pt/index.php/icyurb/sicyurb>

EEC PROVERE – New proposal phase for financial agreement

The Programmes for the Economic Enhancement of Endogenous Resources (PROVERE), approved under the Regional Operational Programmes of the NSRF 2007-2013, predict a new phase of applications for funding of anchor projects.

The initial phase, consisting in the preparation and approval of Action Programmes, assumed a deep effort of cooperation among the several public and private partners within the covered territories. In this context, sets of anchor projects were identified for each Collective Efficiency Strategy, stressing the importance of economic appreciation and strengthening the competitiveness of specific endogenous resources, recognized as catalysts for development and attractiveness of these territories.

At present, it is stressed that the leaders and partnerships responsible for anchor projects should gather technical, operational and financial conditions to ensure their implementation.

Quatenaire Portugal, as consultant of several PROVERE Action Programmes (Sousa Valley Romanesque Route, Douro Wine Region and InMotion: Alentejo, Tourism and Sustainability) is now well placed to give technical support to project leaders. Its competences in the field of project management and project funding models are in the core of the current phase needs.

Quatenaire Portugal is a corporate society created in 1990 and working on the following fields of expertise: Evaluation; Culture; Employment, Competences and Vocational Training; Strategic planning; Spatial Planning; Urban Projects and Policies.

Our approach integrates the development of territories with the improvement of capabilities of private and public organisations. We aim to produce solutions that fit the specific needs of clients and to generate and diffuse pertinent strategic knowledge. In doing so, our multidisciplinary and increasingly qualified group of full time consultants regularly interacts with a network of high-skilled and well known national and international shareholders as well as with a regular and flexible group of external advisers in various fields of expertise.

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