

European Network of Public Employment Services

PES Network Benchlearning Manual



CONTACT

E-mail: EMPL-PES-SECRETARIAT@ec.europa.eu

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THE EUROPEAN NETWORK OF PUBLIC EMPLOYMENT SERVICES

The European Network of Public Employment Services was created following a Decision of the European Parliament and Council in June 2014 (DECISION No 573/2014/EU). Its objective is to reinforce PES capacity, effectiveness and efficiency. This activity has been developed within the work programme of the European PES Network. For further information: <http://ec.europa.eu/social/PESNetwork>.

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BENCHLEARNING

QUANTITATIVE AND QUALITATIVE ASSESSMENT

Benchlearning aims at creating a systematic and integrated link between benchmarking and mutual learning activities. It supports public employment services (PES) to improve their performance by comparing themselves with peer PES and learning from them, in particular, via qualitative and quantitative assessments of PES performance.

Process

Innovative process involving quantitative and qualitative (self-and external) assessment via on-site or virtual visits

When

Ongoing process. Qualitative assessment which is currently repeated after three years

An ideal PES

Using the PES 'excellence model' as a benchmark to measure progress

QUANTITATIVE benchmarking

Yearly data collection, based on 8 benchmarking indicators linked to:

Contribution to reducing unemployment; Contribution to reducing the duration of unemployment and reducing inactivity; Filling of vacancies (including through voluntary labour mobility); Customer satisfaction.

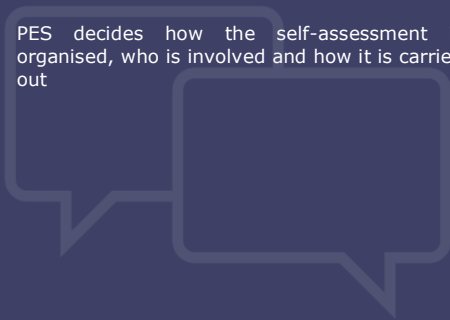


SELF-ASSESSMENT

Uses a tried-and-tested framework to assess the main areas of performance according to four phases (planning, doing, checking and acting).

How it works

PES decides how the self-assessment is organised, who is involved and how it is carried out



EXTERNAL ASSESSMENT

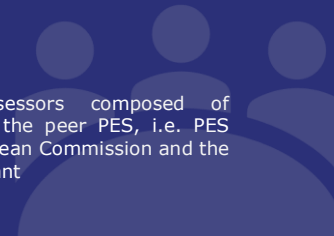
Supports the self-assessment in a learning-oriented approach by providing feedback from experienced and well-intentioned peer experts.

The format

3 days for an on-site visit
3 days if online

Who takes part

A team of assessors composed of representatives of the peer PES, i.e. PES Network, the European Commission and the supporting consultant



RESULTS



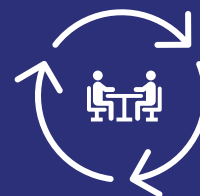
Immediate feedback

Strengths, areas for improvement, suggestions for further development and peer PES who can provide support as a learning partner



A detailed report

Comprehensive description of strengths and good practices and especially detailed recommendations for further improvements



Mutual learning

The results feed into the network's mutual learning activities, in particular the Thematic Learning Dialogues

INTRODUCTION

This Manual presents the conceptual framework of the revised Benchlearning methodology, to be applied for in the context of the fourth cycle of Benchlearning assessments beginning in 2024.

The Manual is primarily designed for practitioners involved in the operations and governance of Public Employment Services (PES) in Europe. It caters to members of the European Network of Public Employment Services (there after PES Network), PES practitioners and assessors, as well as to policymakers and other stakeholders who seek to understand and engage with the Benchlearning methodology. The manual serves as a valuable resource for all those committed to enhancing the efficiency and effectiveness of PES operations.

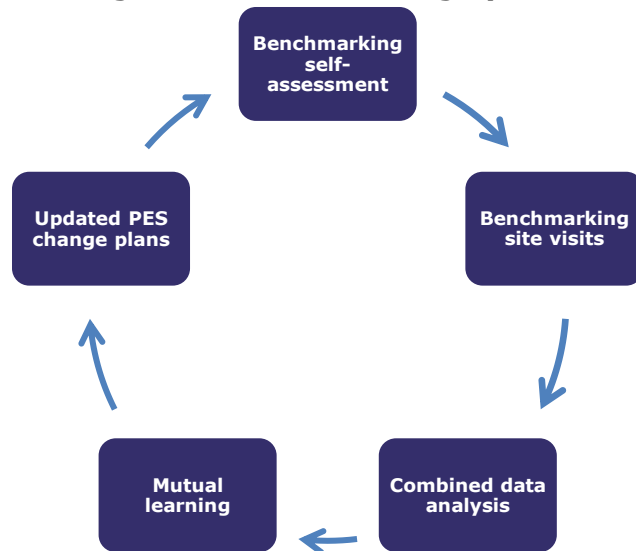
This Manual is not merely a collection of procedures; it is a tool for fostering innovation, improving institutional performance, and adapting to evolving challenges within the realm of employment services. It is complemented by an operational handbook for assessors and PES, which includes more detailed instructions on the practical aspects of conducting assessments.

Background

In 2015, based on a Decision of the European Parliament and Council,¹ the European Network of Public Employment Services (PES) introduced initiatives for the systematic benchmarking of the organisational arrangements, operations, and performance of its constituent PES. Benchmarking is complemented with targeted mutual learning activities, with the ultimate aim of improving the performance of its members and as best as possible service delivery for customers.² These initiatives were brought together through the notion of 'Benchlearning', whereby the performance of each PES is reviewed through qualitative assessment as well as an annual data collection (benchmarking) and the most promising drivers of improved performance are leveraged through exchange with other PES (mutual learning).³

As the PES Network is launching the Fourth Cycle of Benchlearning assessments in 2024, this manual presents the revised methodology of PES Benchlearning. The manual explains how qualitative and

Figure 1 - Benchlearning Cycle



¹ Decision No 573/2014/EU of 15 May 2014; OJ L 159, 28.05.2014, p. 32–39 and Decision (EU) 2020/1782 of 25 November 2020: OJ L 400, 30.11.2020, p. 7–10.

² The term 'customer' is used consistently to designate the two main clients of PES, i.e., jobseekers and employers. PES Network members use different terminology in their national systems, such as beneficiary, client or user.

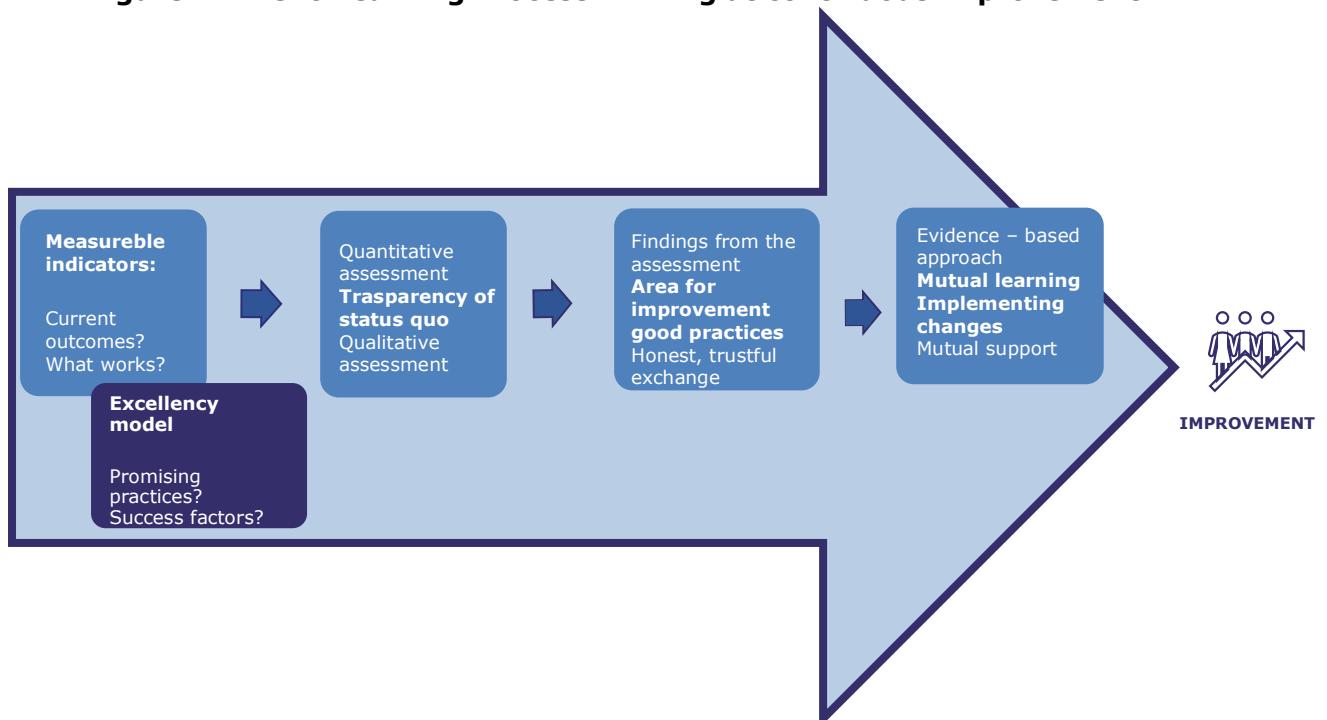
³ Article 2 of Decision No 573/2014/EU of 15 May 2014 defines benchlearning as "the process of creating a systematic and integrated link between benchmarking and mutual learning activities, that consists of identifying good performances through indicator-based benchmarking systems, including data collection, data validation, data consolidation and assessments, with appropriate methodology, and of using findings for tangible and evidence-informed mutual learning activities, including good or best practice models."

quantitative benchmarking support PES to improve their performance by comparing themselves with peers and learning from them. The manual also puts forward a new, updated 'Excellence model' reflecting latest changes in PES governance and ecosystems, as well as the broader labour market challenges PES are facing.

Benchlearning is an iterative process rooted in bottom-up and peer-to-peer approaches to gear innovation and improve institutional performance, in the context of a continuous change management process. It should hence be seen as an essential part of a comprehensive quality management approach. By improving PES performance, Benchlearning also contributes to demonstrating the overall added value of PES for European economies and societies. Benchlearning helps PES identify and reflect on promising practices for increasing their performance, while also supporting them in adapting approaches to their national labour market contexts, mandates and organisational arrangements as well as to best respond to the overall macroeconomic environment.

The Benchlearning methodology builds on a rich history of continuous improvements and participatory contributions of all members of the PES Network. Key success factors of the 1st, 2nd and 3rd cycle of the Benchlearning (which came to an end in 2023)⁴ include good personal relations and mutual confidence between a variety of participants (both generalists and data experts), confidential handling of data and information shared, a working programme based on the needs and interests of participants, and a high degree of commitment of the participants.

Figure 2 – Benchlearning Process -Aiming at continuous improvement



⁴ European Commission (Undated), PES Network's latest 'Benchlearning' cycle: a success story of European solidarity, [website](https://ec.europa.eu/social/main.jsp?langId=en&catId=1100&furtherNews=yes&newsId=10489). Available at: <https://ec.europa.eu/social/main.jsp?langId=en&catId=1100&furtherNews=yes&newsId=10489>

In recent years, the European Commission, Directorate General of Employment, Social Affairs & Inclusion (DG EMPL), initiated and supported a series of joint activities of the European network of Public Employment Services (PES Network). The PES Network and its operations and analytical work (such as official opinions, studies, their contributions to different network and working group meetings) all had a positive influence on the adoption of the Decision No 573/2014/EU and Decision (EU) 2020/1782 and raised expectations of a breakthrough in improving PES efficiency and effectiveness. The Decision on enhanced co-operation between PES legitimated the Benchlearning concept with its benchmarking indicators (see more in 1.2.1).

The aim of Benchlearning is to support PES to improve performance through a systematic comparison of their organisational arrangements and performance against that of an 'ideal PES', facilitated by institutional learning between peers. The characteristics of an 'ideal PES' have been developed building on the concept of organisational excellence as presented in the Excellence Model of the European Foundation for Quality Management (EFQM), including in its most recent 2020 edition.⁵

Key innovations for the 4th Benchlearning cycle

This third edition of the Manual updates the previous PES BL Manual published in 2021,⁶ and reflects key changes and lessons learnt during the 3rd cycle of the Benchlearning.

Key updates made in the methodology between the 3rd and the 4th cycle are summarised below:

- the Excellence Model was reviewed⁷ to help PES **address emerging challenges**, such as **labour and skills shortages**. New concepts introduced by the 2020 EFQM model that are strategically relevant for PES were also incorporated:
 - **Ecosystem** replaces the perspective of bilateral partnership approaches in favour of multi-actor partnerships in which PES collaborate with various stakeholders.
 - **Sustainability** places the emphasis on sustainable operations, with a range of possible strategic implications for PES. It may lead to a focus on green jobs, sustainable filling of vacancies and employment, sustainable industries, sustainable partnerships or sustainable cooperation with PES constituencies, which are likely to differ for the members of the Network at both national and local levels.
 - **Digitalisation** underlines the need for PES to keep up to date with the ongoing digital transformation across all aspects of operations, from developing and maintaining crisis-resilient ICT infrastructure and integrated data management systems to the provision of blended services.
- **More flexibility in the assessment process** will cater for the diverse institutional setups and preferences of PES:
 - **Customisation of the external visit agenda**: PES have the option to decide whether to place additional emphasis on a specific section of the excellence model prior to an assessment.

⁵ For more information on the EFQM model, please visit: www.efqm.org/the-efqm-model

⁶ ISBN: 978-92-76-46605-5.

⁷ It was based on the sound analysis of the most recent scientific literature and the experiences gained by the PES in Europe.

- **Choice of assessment format:** PES can choose between on-site or online assessment formats, ensuring flexibility in the evaluation process.
- **Choice of PES offices to be visited:** A PES can decide on the option that the assessment team visits two local offices with different characteristics and setups through one physical and one online visit. Alternatively, a PES can take the option to replace one local office with a specialised unit, further customising the assessment process.
- The number of Sections of the Excellence Model was reducing to increase user-friendliness. Key specifications of previous Section I on "Crisis Management" were incorporated in an integrated Section G on "PES resources and organisational resilience".

This update of the Benchlearning methodology would not have been possible without the comprehensive efforts of the Task Force dedicated to the revision of the Benchlearning methodology.⁸

The following chapters describe the two main elements of Benchlearning: benchmarking (Chapter 1) and mutual learning (Chapter 2) as they stand in 2023.

⁸ The Task Force comprised members from Austria, Belgium - VDAB, Cyprus, Lithuania, Estonia, France, Germany, Netherlands, Spain and Sweden.

1 BENCHMARKING METHODOLOGY

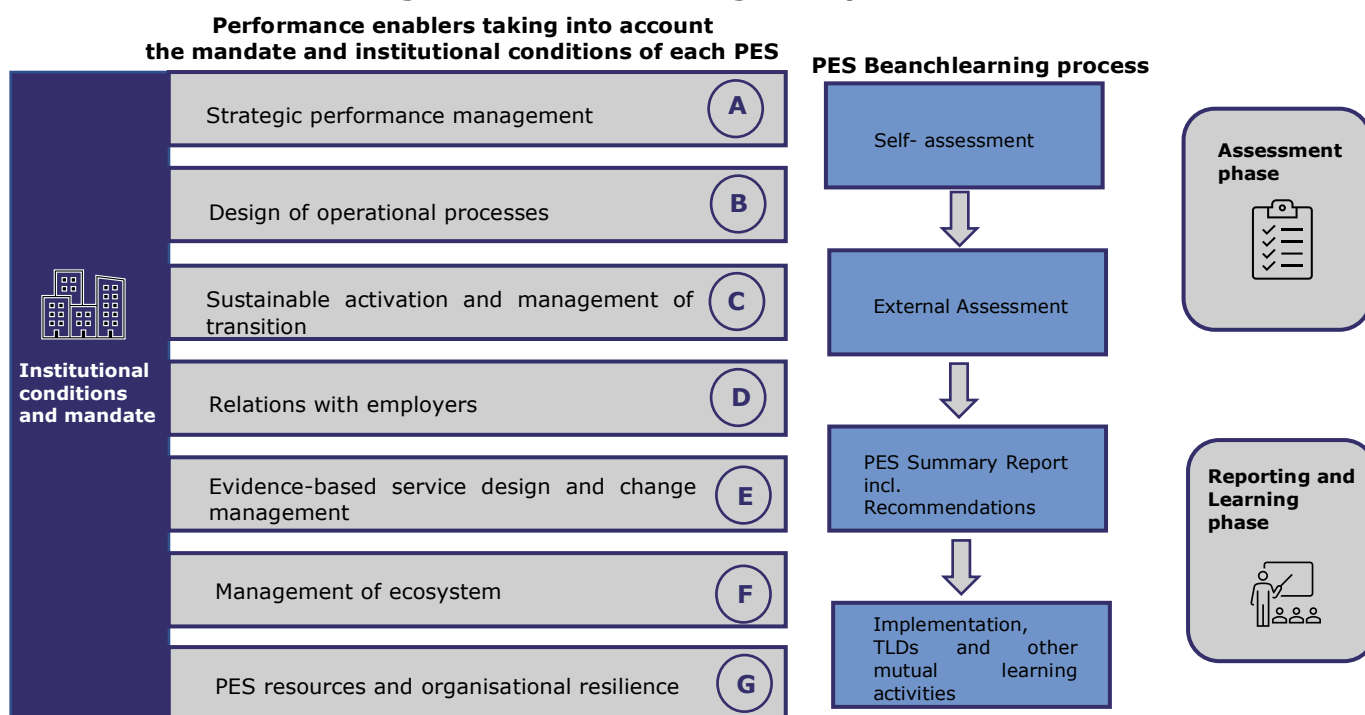
1.1 Conceptual framework in brief

The Members of the PES⁹ Network operate in national and local contexts characterised by different labour markets, institutional setups, mandates, labour market determinants as well as segmentations of labour supply. While these factors are largely beyond the control of the PES, they can have a considerable influence on PES operations and performance. This section introduces the key terminology and concepts of the Benchmarking methodology.

Benchmarking is designed to support PES with an evidence-based, self-sustaining system of continuous and measurable performance improvements within their different national contexts. PES Benchmarking relies on those levers which are generally under direct PES control and can be referred to as PES **performance enablers**. They include strategic management decisions, the design of PES business models and operational processes. These enablers can all have positive or negative consequences on the successful delivery of employment services, and therefore contribute to shaping overall labour market outcomes.

The national context in which PES operate has to be taken into account to ensure that the analytical insights of the benchmarking - and, where feasible, operational recommendations - reflect the 'reality' faced by each PES. At times, the excellence model refers to parameters that, for some PES, may be beyond their direct control. For this reason, the assessment methodology provides PES the option to earmark specific organisational arrangements that are beyond their control during the self-assessment (see section 1.2.3) indicated as mandate disclaimers. The conceptual framework of the benchmarking is visualised in Figure 3.

Figure 3 – Benchlearning conceptual model



⁹ The notion of Public Employment Service (PES) is used in this manual both to identify an individual PES (e.g., The peer PES supports the process through mutual learning activities - singular use) and multiple PES (e.g., Most PES in the Network perform activities aimed to reach out to vulnerable jobseekers - plural use).

The model combines a qualitative and a quantitative component for the assessment of PES performance:

- (i) **Qualitative component:** Qualitative benchmarking of PES organisational arrangements and operations uses qualitative indicators (performance enablers) to benchmark each PES against the organisational arrangements of an 'ideal PES'. This Excellence Model comprises seven Sections (A to G), each including a set of performance enablers that clearly specify the organisational arrangements and operations of an ideal PES. Drawing on the comparison of how a PES operates, compared to how an ideal PES works, recommendations are given and practices for improvement identified. During the qualitative assessment, the PES performance is appraised and scored based on a self-assessment and a subsequent external assessment (see section 1.2). The scoring is designed to indicate the PES maturity with reference to each performance enabler taking into consideration the description of how ideally a PES should operate.¹⁰ For more detailed information on the construction of indicators for organisational maturity, please refer to Annex II; Annex II. Construction of indicators for organisational maturity
- (ii) **Quantitative component:** The methodology for the quantitative component aims to identify key labour market features and challenges as seen from the lenses of PES management and practitioners. The situation analysis is complemented by a review of indicators related to labour market adjustment, such as transition rates, filling of vacancies and customer satisfaction, based on the annual data collection among all PES Network members. Findings from the quantitative components are consolidated into the PES Annual Report, with the view of creating a common understanding of key challenges ahead, enhancing dialogue on how to address common problems, as well as reflecting on what works in specific implementing contexts (see section 1.3).

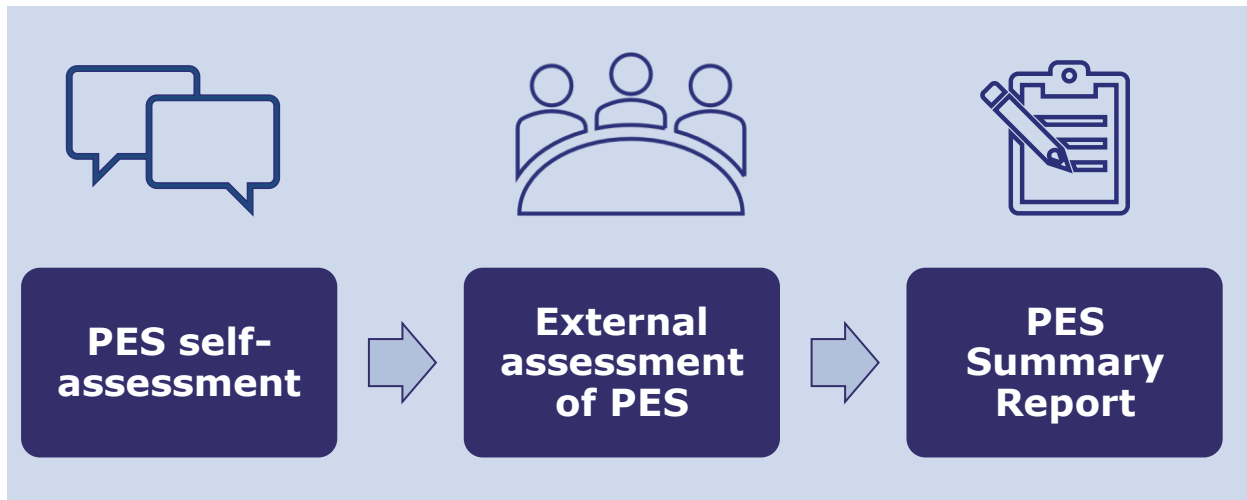
The Manual and its methodology are developed "by the PES and for the PES". PES have full ownership of the recommendations of the Benchlearning exercise, and it remains in their autonomy to act upon them. The following section provides an overview of the qualitative component of the Benchmarking exercise (section 1.2). The quantitative component is described in the subsequent section 1.3.

1.2 Qualitative benchmarking

The qualitative benchmarking of PES performance is based on a two-step process: first, through a self-assessment conducted by each PES, which is followed by an external assessment of the PES through an interactive site visit of independent assessors. The findings of the external PES assessment are then consolidated in a PES Assessment Summary Report (see Figure 4 below).

¹⁰ It is important to note that the scoring is explicitly not designed to create any kind of ranking among PES, but only indicate the level of maturity of a PES observed by external peers. Thus, the reference for any score is always the excellence model with the score measuring to what extent evidence is provided by the PES that the enabler matches the description of the excellence model.

Figure 4 - Sequence of actions during the qualitative assessment



The qualitative assessment is based on a set of qualitative indicators (“performance enablers”) that enable the benchmarking of PES’ organisational arrangements and operations against those of an ‘ideal PES’. The enablers are the core pillar of the PES Excellence Model, which in turn is based on the latest version of the European Foundation for Quality Management (EFQM) Excellence Model. Section 1.2.1 provides an introduction to the EFQM Model and how it informed the development of the PES Excellence Model.

The following section 1.2.2 presents the updated performance enablers for the 4th cycle of the Benchlearning methodology. The section introduces all enablers by contextualising and justifying the concept of excellence for all areas of the Excellence Model from Strategic Performance Management up to the management of PES resources and organisational resilience. Section 1.2.3.1 provides an introduction to the self-assessment process, which is the first step of the assessment procedures. In a next step, the following sections describe the modalities of the subsequent external assessment process (section 1.2.3.2) and finally the PES Summary Report (section 1.2.3.3).

Building on the validated scores provided for each PES following the external assessment, quantitative indicators are generated for each potential performance enabler, designed to reflect the proximity of each PES to the theoretically defined excellence level. This proximity can also be considered the maturity of the organisation with respect to a given benchmark. Annex II provides a detailed overview of the methodology of constructing the indicators for organisational maturity based on the scoring.

1.2.1 Building upon the European Foundation for Quality Management (EFQM) Model

The Excellence Model underpinning the qualitative component of the Benchlearning methodology is based on the Common Assessment Framework (CAF) model, which in turn builds upon the European Foundation for Quality Management (EFQM) model. The updated Excellence Model of the 4th cycle integrates concepts of the 2020 version of the EFQM that are strategically relevant for PES operations.

The updated model includes several new core concepts, with “ecosystem” and “sustainability” being the most strategically relevant for PES. Both concepts can take different meanings in the context of PES mandate and operations.

A core element of the EFQM model is the PDCA cycle (Plan, Do, Check, Act) which forms the basis of the benchlearning scoring process. Since having a plan, implementing it, checking its effects and acting on the findings are a prerequisite for 'learning', the PDCA cycle is implemented in every category of the enablers. The PDCA cycle provides PES with a clear perspective on the strengths and weaknesses of an organisation, and its dynamic evolution over time.

1.2.2 Qualitative indicators

The qualitative indicators used to benchmark the setup and activities of a PES against those of an 'ideal PES' are called performance enablers. They comprise organisational modalities, strategies and operations of a PES that can vary in the short or medium term, as opposed to the macroeconomic climate or labour market conditions that are beyond the direct control of a PES.

Decision No 573/2014/EU of 2014 indicates seven areas of benchmarking through the qualitative internal and external assessment of performance enablers. The box below presents the up-to-date set of PES performance areas/sections and enablers, followed by a detailed description of each item (see Figure 5).

Figure 5 -4th cycle qualitative assessments - PES performance sections and enablers



Section A: *Strategic performance management*

- A1 - Establishing the fundamentals of performance management by target-setting
- A2 - Translation of targets into key performance indicators and measurement
- A3 - Following up performance measurement
- A4 - Making use of the results of performance management



Section B: *Design of operational processes*

- B1 - Process definition and standardisation
- B2 - Information and communications technology (ICT) and data management
- B3 - Quality management
- B4 - Channel management and blended services



Section C: *Sustainable activation and management of transitions*

- C1 - Outreach, profiling and segmentation
- C2 - Individual action plan and ALMP measures
- C3 - Early intervention to avoid unemployment
- C4 - Implementation of services



Section D: *Relations with employers*

- D1 - Employer strategy
- D2 - Specialised unit for employer services
- D3 - Matching vacancies and jobseekers



Section E: *Evidence-based service design and change management*

- E1 - Evidence-based service design and implementation
- E2 - Pilot projects
- E3 - Management of change and innovation



Section F: *Management of ecosystem*

- F1 - Identification and structuring of relevant stakeholders
- F2 - Partnership building and managing
- F3 - Management of partnerships with service providers



Section G: *PES resources and organisational resilience*

- G1 - HR strategy, management and corporate culture
- G2 - Empowerment of staff
- G3 - Organisational resilience and business continuity
- G4 - Budget allocation and use

The following section presents the performance enablers, with the aim to provide guidance to assessors and staff in charge of the self-assessment, as well as PES practitioners more generally. Detailed descriptions of the enablers specify required interfaces within and between the seven sections, which are required for an integrated and holistic approach to Benchmarking that reflects all relevant organisations arrangements of PES.

Section A: Strategic performance management

1. Establishing the fundamentals of performance management by target-setting

Ideally, a PES sets ambitious targets in a process that is

- simple and efficient;
- informed by systematic analyses of the labour market;
- strictly linked to organisational and strategic objectives;
- responding to challenges in the global and regional environment;
- creates value for customers,¹¹ stakeholders and staff; and
- involves regional/local units in a way that allows them to mutually agree on the extent to which they can contribute to achieving national targets, given local economic and labour market circumstances.

Local issues can be addressed through additional targets, maintaining a small and tractable number of targets. Targets are well communicated to all relevant levels of the organisation so that they are perceived as “personal missions to be accomplished” for each employee. Responsibilities for all these activities are clearly defined to ensure accountability. The performance management system (objectives, targets, indicators) is reviewed regularly and updated if necessary.

2. Translation of targets into key performance indicators and measurement

Ideally, a PES translates targets into Key Performance Indicators (KPIs), which are specific, measurable, achievable, relevant, and time-bound (SMART).

KPIs:

- include measures of outcome, efficiency and sustainability of achievements;
- are controlled for creaming effects;
- are broken down to all relevant levels and measured accordingly (regional/local offices, teams/employees);
- systematically compared with predefined target values (benchmarked);
- may be adjusted for regional and/or local factors.

Being a customer-centric organisation, PES measures customer satisfaction as one key performance indicator. If new targets are introduced, indicators are adjusted as well. Responsibilities for all these activities are clearly defined to ensure accountability and each staff member’s contribution is adequately determined.

¹¹ The term ‘customer’ is used consistently to designate the two main clients of PES, i.e., jobseekers and employers. PES Network members use different terminology in their national systems, such as beneficiary, client or user.

3. *Following up performance measurement*

Ideally, a PES shares information on the results of performance measurement in a fixed and easily understandable format and in accordance with an agreed time interval both internally and externally with all relevant stakeholders. The format combines different channels, including user-friendly reports and face-to-face information provided at individual or team level. The time interval is short enough to give useful current feedback, but also long enough to be sure that data quality is high. The achievement of each KPI is discussed through cascaded dialogues across all layers throughout the organisation and involving all relevant staff members. The main characteristics of these performance dialogues are learning, respect and fairness, open discussion, empowerment, reward and recognition. Decisions taken in the dialogue are implemented, monitored, assessed and (if necessary) revised. Responsibilities for all these activities are clearly defined to ensure accountability.

4. *Making use of the results of performance management*

Ideally, a PES implements a system of performance management, which matches the organisational and the individual level, based on performance results to promote continuous improvement. The system is designed to avoid de-motivation or perverse incentives and rewards creativity and innovation. Furthermore, the system is embedded into the PES human resource management strategy. Internal and external Benchmarking between organisational units and PES is fair and further supports continuous improvement. Performance results are presented in a clearly defined, easily understandable format, and used to inform relevant stakeholders in the ecosystem. Responsibilities for all these activities are clearly defined to ensure accountability.

Interfaces between Section A and other sections of performance enablers

Section B: Design of quality management has to respond to performance management system and review of process standards can be integrated into performance management system

Section C: For assessment of effectiveness of services and ALMPs, and the review of job matching quality, the performance management system provides inputs through the integrated data management system.

Section D: Review of employer strategy and quality standards for vacancies can be integrated into performance management system

Section E: Results of strategic performance management provide input to evidence-based service design and change management

Section F: Relevant actors in the ecosystem are involved in target-setting process

Section G: Human Resource Management is closely aligned with the Performance Management System to link operational and social¹² performance at individual and team levels.

Section B: Design of operational processes

1. *Process definition and standardisation*

Ideally, a PES designs operational processes based on its business model and service strategies to enhance the effectiveness, efficiency, orientation towards added value and

¹² Social performance denotes the effective translation of a PES' mission into practice in line with its stated social values and objectives.

transparency of all workflows. Business processes are customer-centric and open for co-design with customers and stakeholders in the PES ecosystem. Furthermore, all business processes are clearly defined, standardised and differentiate between management, core operational and supporting processes. A concept for the management of process interfaces also exists. Furthermore, regional/local levels of the PES can adapt process standards to local peculiarities (e.g., in relation to the size of a local office or the geographical distribution of its branches) in line with standardised processes. Standardised processes are described and, if necessary, graphically visualised. They are documented in a user-friendly handbook or operational guidelines available to all staff. Responsibilities for all these activities are clearly defined to ensure accountability.

2. Information and communications technology (ICT) and data management

Ideally, a PES supports process implementation through a crisis-resilient ICT infrastructure and integrated data management system. An ICT strategy is available. It is explicitly linked with the organisation's business goals and enables the achievement of the operational targets as specified in A1/A2. The ICT strategy integrates a data management strategy and is supported by an effective governance model. The PES aims at high-quality individual-level data for individual case processing but also provides a solid base for analysis, evaluation and forecasting purposes, including skills forecasting. Under the authorisation of data protection regulation, the data is made available to all relevant levels of the organisation, including counsellors in contact with the customers of the PES. The use of data (including advanced analytics and AI, where applicable) aligns with documented principles of personal data protection, transparency and ethical consideration.

3. Quality management

Ideally, a PES has implemented a quality management system based on recognised national and/or international standards. Quality management tools allow the ongoing monitoring of predefined quality standards. The quality management system supports a systematic approach to quality which builds on an informed setting of priorities and modalities of quality assurance. The quality management system focuses on the commitments of the PES towards customers and quality of processes and guides regular inspection of quality. All staff are aware of the importance of their contribution to overall quality and are involved in adjustments to the quality systems, as required. Quality standards which customers can expect are communicated externally. A PES uses the quality management system for continuous improvement and learning. In addition, internal and external Benchlearning also contributes to continuous improvement. As a result, quality is not perceived as a goal but as a process which continues. Contributing to organisational resilience and business continuity (Enabler G3), a culture of informed risk management is in place to support the overall quality management. Responsibilities for all these activities are clearly defined to ensure accountability.

4. Channel management and blended services

Ideally, a PES defines a channel management strategy which:

- combines different channels of service provision (i.e., blended services) for a seamless customer journey,
- ensures channel switching is seamless, and service accessibility is provided according to the individualised needs of employers and jobseekers,
- includes informing customers about the different channels available,
- is based on a well-functioning technology and suitable backup systems,
- promotes the online channel,

- considers the accessibility of face-to-face and online channels and the digital literacy levels and individual situations of customers and staff,
- contains a strategy for monitoring and evaluating customer-friendliness, effectiveness as well as efficiency of different channels and
- offers support/help for customers on different channels.

A PES trains relevant staff members to put blended services into practice. Responsibilities for all these activities are clearly defined to ensure accountability.

Interfaces between Section B and other sections of performance enablers

Section A: Design of quality management has to match with performance management system and review of process standards can be integrated into performance management system

Section C: Quality standards, targets and procedures (e.g., regulating the minimum number of contacts between employment counsellor and customers) should be part of quality management, using the integrated data management system

Section D: Quality of job matching and employer-centric services should be part of quality management

Section E: Evidence-based design of service strategies for jobseekers and employers are basis for process definition and standardisation

Section F: Quality standards for service providers should be part of quality management

Section G: Training for implementation of blended services should be part of HRM strategy

Section C: Sustainable activation and management of transitions

1. Outreach, profiling and segmentation

Ideally, a PES encourages registration of potential customers to benefit from timely support. A PES uses a holistic and inclusive approach to assess an individual's employment potential through profiling. Profiling encompasses various methods, such as individual and group approaches, as well as statistical profiling. In addition to traditional factors such as employment record, work experience, and formal qualifications ("hard facts"), the profiling process also evaluates the complete range of competencies and skills possessed by a jobseeker (skills-based profiling) as well as existing barriers to employment and the jobseeker's employment goals. Emerging technological solutions are systematically reviewed to enhance the assessment process. The profiling is conducted periodically at specified intervals. Based on the profiling results, customers are guided through the most suitable pathways of their customer's journey. Employment counsellors can refer customers to specialised service units or expert teams for cases that require additional time or present complexity.

A PES categorises jobseekers into specific customer segments based on their level of need, determined through a holistic and inclusive profiling process. Using customer segmentation, PES can implement targeted operational strategies for each customer segment. This approach allows for focused workload management and equitable distribution among employment counsellors. The segmentation of jobseekers is based on procedures that regulate the minimum number of contacts, the duration of each contact

and the number of cases to be handled by each employment counsellor. The workload of each counsellor takes into account individual and local conditions of the cases.

2. Individual action plan and ALMP measures

Ideally, a PES formulates an individual action plan together with the jobseeker, considering the profiling results and the segmentation of jobseekers. If legally possible, it is based on mutual obligations. A PES uses a comprehensive range of support services and tools within customer's journey pathways to facilitate a sustainable transition into the non-subsidised labour market. These services are tailored to meet the specific needs of individual customers. Participation in active labour market policy measures can be an integral component of the individual action plan. The definition of service bundles from which employment counsellors can choose is based on clear criteria for the use of ALMP measures, subject to jobseeker segments and considering the full range of available measures. For jobseekers in ALMPs, proactive support services are available to participants during and after participation. A PES adheres to the principle of early intervention to minimise the duration of unemployment and prevent long-term unemployment. To achieve this, service provision to jobseekers begins promptly after their registration at the PES. A clear guideline specifies the maximum days between registration and the first contact or interview with the employment counsellor. Regular evaluation of the effectiveness and efficiency of active labour market policy measures is conducted, including post-measure assessments.

3. Early intervention to avoid unemployment

Ideally, a PES adheres to the principle of early intervention to prevent unemployment. A PES formulates a proactive approach to prevention by providing services, such as career counselling and upskilling programmes, to employed individuals who are at risk of losing their jobs. The proactive approach also takes into account future skills and labour market needs. A PES designs these services to engage individuals in early, intensive, and active job search activities. These services include the use of PES self-service systems. A clear concept is in place to provide high-quality, time-bound, and tangible offers to youth in collaboration with external education providers and stakeholders. The strategy aims to ensure transparency in delivering these services to youth, promoting effective transitions into the labour market.

4. Implementation of services

Ideally, a PES facilitates the implementation of services and products provided to jobseekers through a transparent system that offers flexibility in service delivery. This system allows choosing between in-house provision or contracting services to external providers. Clear guidelines are in place to determine the circumstances and specific services/products for which external service providers or public institutions are engaged. Regional and local PES offices have an appropriate level of flexibility that enables them to combine different services and ALMPs and define target groups based on regional or local characteristics.

Interfaces between Section C and other sections of performance enablers

Section A: For identification of ALMP-effectiveness and review of job matching quality the performance management system can deliver input via data management system

Section B: Quality standards, targets and procedures should be part of quality management, using the integrated data management system

Section D: Matching of jobseekers and vacancies should be done in close cooperation with the employer service unit

Section E: Pilot projects for new services for customers

Section F: Cooperative management of cases with other stakeholders in the ecosystem and use of external service providers

Section G: Continuous training of PES staff to implement holistic and inclusive profiling techniques

Section D: Relations with employers

1. Employer strategy

For a target-oriented service provision to employers, a PES has ideally developed and implemented a transparent strategy for employers. The strategy identifies, establishes and develops a trustful relationship between PES and different segments of employers (e.g., by size and by sector), encouraging them to make active use of PES services, including ALMPs, while also contributing to relieving labour shortages. The strategy is informed by thorough and regionally disaggregated labour market analyses.

The strategy clearly distinguishes between

- the core activity of actively acquiring vacancies and matching them with jobseekers, including advisory services directly related to this activity and the use of ALMP measures in this context;
- post-recruitment support; and
- complementary further services (e.g., early identification of skills shortages and hard-to-fill vacancies in cooperation with employers, counselling regarding strategies to meet the needs for skilled workforce and continuing vocational training).

Furthermore, the strategy explicitly addresses the segmentation of employer services based on their needs. It offers a clear concept of whether employer services should be provided universally, segmented or in a tailor-made way. PES involves employers in the design and review of services and ALMPs. The strategy is communicated to PES staff and employers.

2. Specialised unit for employer services

Ideally, a PES runs a specialised unit (department or team) responsible for all contacts with employer customers. Members of staff display proactivity and a clear customer service approach. The employers' service unit embodies the principle of "one face to the customer" and serves as a one-stop-shop for employers, with individual contact persons for each employer. Staff in the employers' service unit have a profound knowledge of the regional/local labour market and a deep understanding of the companies' needs, enabling them to search for the right solution and support employers. Close collaboration with

employers is pursued to act promptly upon potential reorganisation processes or other factors that could lead to redundancies or changes in skill requirements.

3. *Matching vacancies and jobseekers*

Ideally, a PES attaches particular importance to a well-functioning interface between employer services and jobseeker services in order to match vacancies and jobseekers. To foster mobility and mitigate possible regional mismatches, PES ensures the widest possible coverage of their database of jobseekers and vacancies. A PES fosters intra-national and intra-EU (EURES Network) mobility. To achieve the best possible matches, a two-step process combines an ICT-driven automated skill-based matching with a further refined selection by the employment counsellors. Skills-based matching is based on a taxonomy of skills and occupations implemented in the PES. The quality of the matching process and design of the service offer is reviewed regularly, taking employers' feedback into account (e.g., via employer satisfaction surveys).

Interfaces between Section D and other sections of performance enablers

Section A: Employer strategy shall be parameterised into a system of targets and KPIs.

Section B: Matching quality and counselling on options to fill vacancies should be part of quality management

Section C: Matching of jobseekers and vacancies should be done in close cooperation with employment counsellors

Section E: Pilot projects for new services for customers

Section F: Employer associations and/or chambers can be important stakeholders for partnerships

Section G: Specialised training for staff of employer service unit

Section E: Evidence-based service design and change management

1. *Evidence-based service design and implementation*

Ideally, a PES is regularly evaluating its practices and builds evidence-based service design and implementation on information from:

- performance management system;
- ex-ante evaluations;
- ex-post evaluations; and
- short- and long-term forecasts of labour and skills needs.

Ex-ante evaluations are conducted before service implementation to evaluate the likely effects of the specific service design. Regular ex-post evaluations are conducted on already implemented services to ensure their efficiency, effectiveness, and impact. The evaluation results are communicated and published regularly in a transparent and comprehensible format to employees on all organisational levels of the PES and to the public. A PES incorporates evaluation results into the everyday work instructions and/or tools of employees providing the services to customers (e.g., guidelines for allocating jobseekers to effective training measures according to their background characteristics).

2. Pilot projects

Ideally, a PES conducts pilot projects to test new approaches. Pilot projects have enough resources (e.g., know-how, staff, finances) and time, make use of experiences from best practices, other partners and customers. Pilot projects are used in a limited number of offices or for a limited number of customers to gain experience/insights on the effects of such approaches while minimising possible negative side effects. A PES evaluates the effects of such pilot projects rigorously using a combination of implementation and impact analyses. A PES has a strategy or plan, which tasks of the pilot project should be achieved in order to be rolled out in the entire organisation. Furthermore, a PES takes into account that results from pilot projects can suffer from biases and that the extrapolation of results from pilot projects to the organisation as a whole has to be done very carefully.

3. Management of change and innovation

Ideally, a PES has a strategy for change and innovation. Change and innovation processes are actively anticipated and managed. A PES perceives change and innovation as an opportunity to improve its performance and involves employees and other stakeholders, such as customers or relevant partners at an early stage, and during the entire process. Different approaches are used to actively manage change and innovation, taking into account the expertise at all organisational and staff levels. A PES ensures the sustainability of change by reinforcing activities which aim at anchoring all changes sufficiently in the organisational practices and culture.

Interfaces between Section E and other sections of performance enablers

Section A: Results of strategic performance management provide input to evidence base

Section B: Evidence is systematically integrated in data management system and evidence-based design of service strategies for jobseekers and employers are used for process definition and standardisation

Section C: Pilot projects for new services for jobseekers

Section D: Pilot projects for new services for employers

Section F: Communication of evaluation results to all relevant stakeholders

Section G: Involvement of regional/local levels in management of change and innovation

Section F: Management of ecosystem

1. Identification and structuring of relevant stakeholders

Ideally, a PES has identified the relevant stakeholders both on a national and a regional/local level as part of its ecosystem and has classified them in functional groups. A PES continuously conducts stakeholder mappings and engagement to take into account dynamic changes in the ecosystem. Stakeholders in the ecosystem involve institutional stakeholders and organisations speaking for jobseekers and employers. For each relevant stakeholder, the type or the nature of the relationship (e.g., governing authority, service provider, social partner etc.) is clearly defined, including cooperation rules and coordination mechanisms between partners in the ecosystem. A PES supports interconnected partnerships between several stakeholders in the ecosystem. The ecosystem enables each stakeholder to reach the collective as well as their own defined objectives. The relationship with and between the stakeholders at the different levels

(national, regional, local) is analysed, and the relevance for PES services (given objectives and targets of the PES) at these levels is assessed. All employees are aware of the relevant functions of all important stakeholders.

2. Partnership building and managing

Ideally, a PES builds partnerships completing its ecosystem with non-governmental organisations, education and training providers, municipal and regional authorities, social support service providers, employers' organisations, social partners, local stakeholders/communities, private employment agencies, temporary work agencies and others as deemed relevant and justified. Building partnerships is a clearly defined objective of the organisation and is carried out at all levels of the organisation (national or sub-national). Setting up partnership programmes and actions aims to ensure innovative collaborative policy implementation, outreach activities and inclusion. Regional and local managers have a clear mandate to build and maintain partnerships. A PES builds a culture of collaboration and establishes international partnerships.

In addition, a PES manages the relationship with the supervising bodies:

- by involving them in all relevant phases of the strategic management and service provision process;
- by developing transparent agreements for the responsibilities of each partner;
- by systematically monitoring and evaluating the implementation and the results of partnerships; and
- by sharing the monitoring/evaluation results with all supervising bodies.

3. Management of partnerships with service providers

Ideally, a PES manages the partnerships with service providers mentioned in C4:

- by involving them in all relevant phases of the strategic management and service provision process,
- by developing transparent agreements for each partner's responsibilities,
- by systematically monitoring and evaluating the implementation and the results of partnerships, including through customer satisfaction surveys,
- by sharing the monitoring/evaluation results with all partners;
- and by involving partners in reflecting results of monitoring and evaluation in improving partnerships.

Furthermore, a PES develops precise selection criteria, which build on performance measures and are applied in a formal procurement process. A PES monitors and evaluates the outcomes of service providers' activities, such as the job integration rate, in line with the principle of "The money goes where the results are achieved". In the operation of service contracts, transparent quality standards are necessary and are systematically monitored.

Interfaces between Section F and other sections of performance enablers

Section A: Stakeholder engagement in target-setting process and information on target achievement

Section B: Quality standards for service providers should be part of quality management

Section C: Cooperative management of cases with other stakeholders in the ecosystem and use of external service providers

Section D: Employer associations and/or chambers can be important stakeholders for partnerships

Section E: Communication of evaluation results to all relevant stakeholders

Section G: Involvement of regional and local level in partnership building

Section G: PES resources and organisational resilience

1. HR strategy, management and corporate culture

Ideally, a PES develops and implements a clear human resource management strategy which consists of the following central elements:

- job profiles, definition of qualifications and skills for all functions at all organisational levels considering developments in the ecosystem. These profiles are made accessible to all employees;
- ongoing analyses of the organisation's human resource capacity and forecasts of requirements and responses to HR challenges (e.g., age pyramid or detection of leadership potential);
- skills-based flexible recruitment methods enable timely filling of all vacancies on all organisational levels guaranteeing a match between the candidate's profile and the position to be filled. Regional/local offices take part in the recruitment decision for their staff;
- an integration and guidance pathway to support new recruits in a personalised and multimodal way (training, tutoring, coaching, etc.); and
- a corporate health management system preventing potential risks to health and safety of staff.

2. Empowerment of staff

Ideally, a PES manages and reviews the transformation of culture, organisation and leadership, considering alternative ways of working, which leads to more autonomy, a higher sense of responsibility and commitment. A culture of trust and error tolerance acts as the foundation of an organisation linking operational and social performance. A PES makes use of:

- a further training system anchored in the PES ecosystem and encouraged lifelong learning;
- a career development plan which is competence-based, ensuring the delivery of a high-quality PES service offer. The training plan also takes into account new uses of digital technologies and incorporates a life-cycle approach which encompasses work-life balance while also integrating societal evolutions: quality of life at work,

diversity of the workforce, active management of inclusion, combatting all forms of discrimination; and

- a strategy to improve the PES brand as an employer and to attract and retain high-quality staff. Its implementation within the organisation is monitored systematically, which includes regular staff satisfaction surveys.

The measures include:

- activities and projects for promoting an open and proactive sharing of information within the organisation; and
- activities to promote leadership and the trust of managers in their staff and vice versa.

The mix of appropriate measures in the planning document developed by the PES is revised and updated at regular intervals.

3. *Organisational resilience and business continuity*

Ideally, a PES implements a business continuity strategy for easily adapting to - and integrating into - a changing environment. The strategy is based on recognised national and/or international standards. The strategy aims at maintaining operational capacity during events putting increased pressure on the organisation, regardless of the type and duration of the risk. A PES improves its capacity for risk awareness, risk analysis and risk management and a regularly tested contingency plan is in place. Furthermore, training is used to improve the staff capacity to develop and implement diverging but coordinated actions in an emergency. All organisational and regional levels of the PES are actively involved in planning and implementing the strategy and point out risks at an early stage.

4. *Budget allocation and use*

Ideally, a PES bases the allocation of financial resources on a strict target-oriented procedure. A transparent calendar foresees regular steps to monitor progress and review both budget consumption and landing forecasts, i.e., the distribution of financial resources from the central to the regional/local level, when applicable, follows an analysis of the regional/local labour market situation and the targets to be achieved given this situation in bilateral negotiations. After the budget is distributed, regional/local offices are flexible to use it according to their needs based on organisational guidelines. Simultaneously, regional/local offices are also fully accountable for the results. A focus on measuring efficiency and cost-benefit aspects is applied while using the budget. To ensure this, the performance management system can inform about target achievement of each regional/local office in due time. Different types of funding can be used to supplement the budget (for example, EU funds).

Interfaces between Section G and other sections of performance enablers

Section A: Efficiency of allocating human and financial resources is measured through KPIs and the overall performance management system

Section B: Training for implementation of blended services should be part of HRM

Section C: Possibility to resort to specialised support for holistic and inclusive profiling

Section D: Specialised training for staff of employer service unit

Section E: Involvement of regional/local levels in management of change and innovation

Section F: Involvement of regional/local level in partnership building

1.2.3 Qualitative assessment process

Qualitative assessment of PES performance includes two core elements: PES self-assessment and external PES assessment arranged through PES site visits. Findings of the external PES assessment are documented in the PES Assessment Summary Report.

1.2.3.1 *The self-assessment*

At the beginning of the qualitative assessment of PES, each PES is asked to conduct a **self-assessment**. The primary objectives of the PES self-assessment are: (1) to identify strengths and weaknesses in different areas of functioning of the PES; (2) to establish potential areas of improvement; (3) to identify and document potential actions and ways that could improve those promising areas of the PES work and structures. During the qualitative assessment, the PES performance is assessed and scored by each enabler using the standardised self-assessment template presented in Annex I.

During the PES self-assessment, PES assesses their organisational solutions in core areas. In the 4th cycle, the self-assessment will be carried out as a full stocktaking of sections A-G. PES should conduct a structured and systematic reflection on its performance and should take a close look at the potential performance enablers described in section 1.2.1.

When filling in the self-assessment form, PES may ask the key stakeholders for feedback as well. They can then invite these stakeholders to participate in the discussion during the PES assessment visit, when section F is being discussed.

To report on the result of the self-assessment exercise, PES should fill out the self-assessment template, respecting the logic of the PDCA (Plan, Do, Check, Act) cycle.

These filled out self-assessment forms are then used by external assessors as one major source of information to build upon as a starting point of the assessment aiming at a comprehensive assessment and feedback. The decision on the organisation of the self-assessment process, as well as on the levels of PES to be included in the process is taken by the PES itself. The result of the PES self-assessment is a self-scoring of all performance enablers for all steps of the PDCA cycle. Scores should be given for each individual phase of the cycle ("Planning", "Doing", "Checking" and "Acting") for each enabler. The scores should always refer to the description of the enabler. The more evidence given that the current state of play in the host PES matches the description of the enabler, the higher the score. For example, a score of "6" means that the PES can demonstrate a 100% compliance with all the elements of the corresponding enabler description.

To further and more systematically link the elements of mutual learning and Benchmarking, an additional format of Mutual Learning was introduced during the second cycle and reconducted during the third cycle: the **Thematic Learning Dialogues (TLDs)**.¹³ If the PES did not participate in a TLD in the 3rd cycle as a student PES, they will be exempt from answering to the TLD-related questions in the annex of the self-assessment template (see excerpt in Annex I. Excerpt of the Self-assessment Template for the 4th assessment cycle (Enabler A1 and Annex on impact of the participation in Thematic Learning Dialogues) PES should also signal all instances where their mandate prevents them from pursuing/attaining an element of an enabler. The reported information should be validated during the assessment visit, and, if applicable, PES shall not be scored on those elements of an enabler for which it has no mandate. But assessors can provide recommendations, if asked to do so or if a new mandate could increase quality of service for costumers.

¹³ For more information, please see Chapter 2 of this manual on Mutual learning.

1.2.3.2 *The external assessment*

The main purpose of the **external assessment** is to support and complement the self-assessments by providing feedback to each PES. At the same time, it is a core exercise in the process of Benchlearning to foster cooperation between PES thereby improving the quality and potentially the performance of PES services.

During the **external assessment**, which is organised as a three-day visit, either on-site or online the self-assessment scores of the hosting PES are complemented by the scores given by a team of external assessors. The assessment team consists of members of the PES Network, experts from the supporting consultant team and representatives of the European Commission.

Given the exceptional circumstances caused by COVID-19, almost all 3rd cycle assessments were conducted generally virtually. The satisfaction rate of PES with the virtual assessments was high; therefore, in the 4th cycle assessments the host PES may decide whether the site visit will be implemented in person onsite or online. In both options, a 3-day agenda is expected.

The external assessors conduct a review of the self-assessment to gauge whether it reflects the realities of the organisation to an informed, interested and well-intended outsider. To ensure such a fair and informed judgement, it is essential that external assessors are recruited primarily among experienced and highly qualified PES staff. The ideal profile of an assessor comprises a minimum of ten years of experience of working in their national PES; they should be currently working at middle to senior operational/management level. Good communication skills and command of the English language are also relevant general skills necessary for facilitating a smooth, open and high-level discussion between peers. Finally, expertise in strategic management and in-depth knowledge of operational processes can be considered crucial to fill this position. By providing experienced staff for the position of assessors, PES can make a key contribution to the overall success of the Benchlearning exercise. The combination of a systematic and evidence-based conceptual approach with strong and committed assessors ensures the provision of well-founded and helpful recommendations as a core objective of the Benchlearning process; an outcome that is beneficial to all members of the PES Network in the end. Experienced assessors can also contribute valuable input and inspiration to their own PES based on their experiences from the site visits they participated in. Finally, the support of assessors has proven valuable in the process of completing the self-assessment.

Where signalled by PES in self-assessment, external assessment should probe mandate limitations and – if applicable – not score on those elements of an enabler for which PES has no mandate.

Each PES can then expect an immediate feedback at the end of the visit and a comprehensive assessment report. This report will include a presentation of the observed strengths and good practices of the organisation along with an identification of areas with potential room for improvement, if any, together with suggested actions to assist such improvements and the indication of potential partner PES with a high maturity and outstanding experience in those areas. The good practices identified during the assessments can then be explored and exchanged with other PES during mutual learning activities and events.

The agenda of the visit

Day 1

Day 1 of the visit is dedicated to the PES head office. The morning session is devoted to important developments and changes since the 3rd assessment cycle including challenges and to the impact of post-COVID recovery and participation in Thematic Learning Dialogues. Following this introductory session, four blocks of parallel discussion sessions are scheduled for the rest of the day, in which the participants will discuss enablers. In the "site visit questionnaire", the host PES will have the possibility to indicate whether they would like to spend more time on one specific section in one of the parallel sessions. This option was added following the suggestions provided by PES in the evaluation of 3rd cycle, who wished to apply more flexibility in the agenda to obtain more time to discuss sections considered most important for PES. PES also have an option to involve additional external top partners in discussion on Section F.

Day 2

On Day 2, the external assessors will split up into two groups and visit one local office each, which are different by nature in order to broaden the range of offices. Alternatively, the one group will visit a specialised unit of PES instead as wished in the 3rd cycle evaluation. The objective of the local office/ specialised unit visits is to gain a better understanding of how the strategic ambitions developed at the head office level work in operational practice. At the local offices, the assessors conduct three group discussions: (1) with senior managers, (2) with middle managers/team leaders, and (3) with the counsellors/front-line staff.

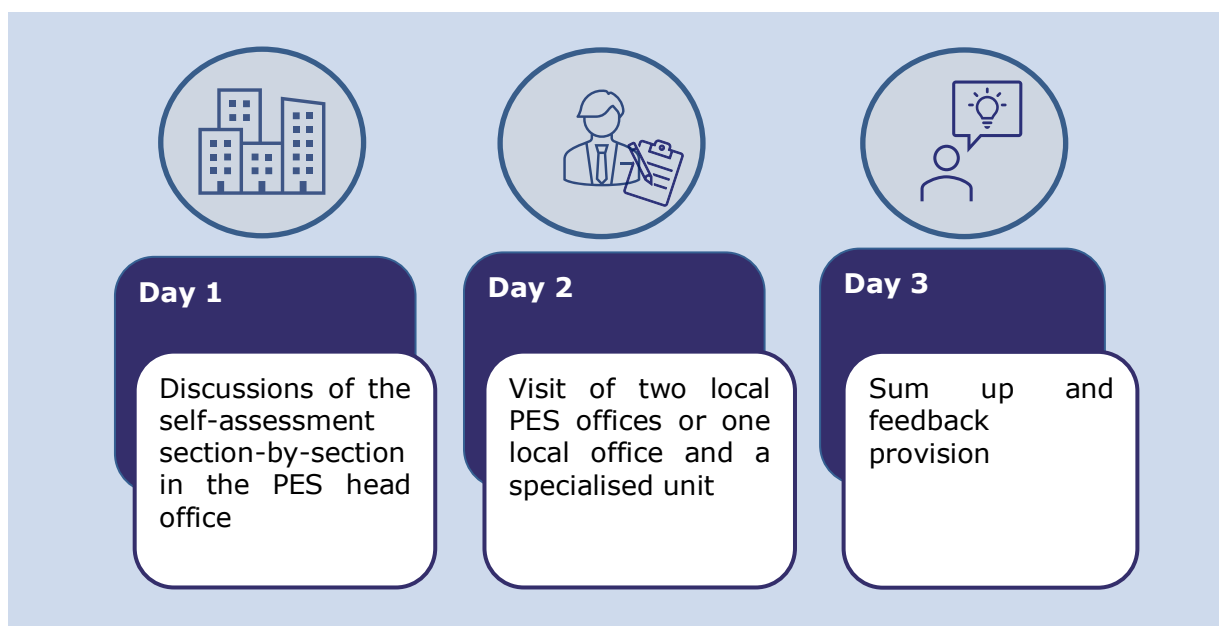
Day 3

On the 3rd day of the visit the assessors meet to agree and give key feedback messages and initial observations to the senior management of the hosting PES. The assessor team also jointly agrees on the scoring of each enabler.

The internal working session will be followed first by a presentation of outcomes and recommendations (including suggestions for reference PES) for the top management of the PES. A discussion of the presented findings and recommendations will take place as a moderated discussion round.

The final session starts with findings on the strengths of a PES. The general room for improvement for the reference PES is then identified and addressed by the assessment team. Finally, concrete recommendations are given on areas where improvements may further enhance PES operations and outcomes, so areas of the PES performance where suggestions for enhancements might be useful. For each recommendation reference PES with a high maturity level in the specific area which is addressed by the recommendation are indicated. The suggestions are based on the assessors' experiences and the evidence collected in previous assessment cycles which are stored and visualised in the PES Benchlearning Dashboard. All recommendations are further elaborated in the individual Summary Report.

Figure 6 – The agenda of the visit



1.2.3.3 *The PES Summary Report*

A comprehensive PES Summary Report is designed to be reader-friendly, focused and written in a supportive and constructive style. The table of scores agreed among assessors also becomes a part of the Summary Report, which, apart from the core body of the report, also includes a table with assessors' findings for each enabler, recommendations and the identification of certain practices that could be of interest and use to other PES.

The latter element of good practices is another crucial link between the Benchmarking of the external assessments and the process of Mutual Learning, jointly forming the approach of Benchlearning. During the visits, the external assessors always try to identify good or promising practices that are innovative and might serve as examples and references for the efforts of other PES. A good practice does not necessarily require a high overall maturity of a PES in the respective field where a practice is identified.

Outline of the PES Summary Report

1. Introduction
2. Short summary of the major changes between the 3rd and the 4th assessment visits
3. Outcomes of participation in the Thematic Learning Dialogues (if relevant)
4. Areas where improvements could further enhance PES operations and outcomes
5. Suggestions and recommendations
6. Summary of external scoring
7. Detailed external assessment commentary and scoring

As can be seen in the structure of the Summary Report, one objective of the 4th cycle visits is to assess the effectiveness of mutual learning formats and whether they have a concrete impact on a PES performance. Please note that it must be part of the preparation to collect participation of host PES in learning formats.

If, how and via which channel the Summary Report, its findings and recommendations are shared at all organisational and/or regional levels is under the responsibility of each PES.

1.3 Quantitative assessment

The quantitative component of the Benchlearning methodology deploys analytical tools to earmark key labour market trends that affect PES operations now and in perspective. The guiding idea of the quantitative assessment process is to provide insights that are directly relevant for PES managers and practitioners at national and local levels.

All data collected from PES during the annual data collection exercise and other sources accessible to the Network members are made available on the PES Benchlearning dashboard. The dashboard provides a user-friendly visualisation of the data with the option of finding and comparing similarities and differences across PES¹⁴.

A discussion is currently ongoing within the PES Network on revising the current data collection methodology as well as increasing synergies between qualitative and quantitative benchlearning. The Manual will be updated on this basis.

Quantitative indicators

The Decision No 573/2014/EU and Decision (EU) 2020/1782 define the set of indicators that provide a quantitative outlook of PES operations. They constitute the backbone of the evidence collected within the quantitative component of the Benchlearning methodology, by providing measures on the labour market adjustment function performed by the PES. The mandatory indicators are organised in four sections with two indicators each, for a total of eight indicators, which are collected annually.

Mandatory quantitative indicators

1. Contribution to reducing unemployment for all age groups and for vulnerable groups:
 - a. Transition from unemployment into employment per age group, gender and qualification level, as a share of the stock of registered unemployed persons;
 - b. Number of people leaving the PES unemployment records, as a share of registered unemployed persons.
2. Contribution to reducing the duration of unemployment and reducing inactivity, so as to address long-term and structural unemployment, as well as social exclusion:
 - a. Transition into employment within, for example, 6 and 12 months of unemployment per age group, gender and qualification level, as a share of all PES register transitions into employment;
 - b. Entries into a PES register of previously inactive persons, as a share of all entries into that PES register per age group and gender.
3. Filling of vacancies (including through voluntary labour mobility):
 - a. Job vacancies filled;
 - b. Answers to Eurostat's Labour Force Survey on the contribution of PES to the finding of the respondent's current job;

¹⁴ The PES BL Dashboard (<http://dashboard.pes-benchlearning.eu>) is a specifically created platform on the Internet with a restricted access to PES representatives who are actively engaged in PES benchlearning activities. The Dashboard stores all relevant information and publications produced during the different assessment cycles such as methodological papers, Summary Reports of all PES assessments carried out or reports summarising the results and outcomes of Thematic Learning Dialogues. It also offers a variety of visualised information related to qualitative and quantitative benchmarking (maturity levels) as well as an overview of thematically structured potential learning partnerships between advanced and less advanced PES.

4. Customer satisfaction with PES services:

- a. Overall satisfaction of jobseekers;
- b. Overall satisfaction of employers.

With the exception of indicator 3b., all indicators are based on PES administrative data, which are collected annually through the Network.

2 MUTUAL LEARNING

Over the course of the three cycles of Benchlearning, a broad range of Mutual Learning (ML) formats has been developed forming the complementing element of 'Learning' to the 'Benchmarking' described in the previous chapter. With different organisational frameworks, focus and target-groups, these events serve to disseminate the knowledge accumulated by the various contributors to the PES network and support the process of learning and development among PES. The ML concept also builds upon the evidence from the Benchlearning data collection and assessments. This evidence has enabled ML activities to be increasingly designed, delivered and targeted in relation to PES learning needs, and to identify, disseminate and facilitate the transfer of good practice amongst PES.

The annual, comprehensive ML programme for the PES Network¹⁵ is intended to structure and support the ML activities and also draws on the evidence base of identified learning needs and maturity of PES. In addition to the common programme, individual PES initiate learning events or exchanges with other PES around common challenging topics.

As the site visit reports clearly indicate, learning is facilitated by pointing out peer PES as potential exchange partners for certain areas for improvement:

- enhance the collaboration with employers to facilitate the supply of suitably skilled workforce
- build up efficient ICT systems and customer-friendly eServices
- review their indicators, target-setting and the overall organisational structure
- further improve competence-based matching and quality management systems
- increase resilience
- establish broad range of targeted and effective partnerships
- develop a future-proof HR system
- invest in staff skills.
- share, apply and upscale good practices deployed within the PES Network.

The aim of the Mutual learning activities is to provide opportunity for sharing of experience and peer support in these and other topics with relevance to the PES, contributing to the virtual cycle of improvement in PES capacity and performance.

During the first two Benchlearning cycles, the various learning formats benefited from the site visits mainly via the identification of leaders and needs among PES as well as good practices to be shared among the PES community. For example, a need for counselling in the form of a **Mutual Assistance Project** might be identified based on the recommendations during a site visit. By initiating such a support measure, PES can address their constraints and challenges in terms of limited expertise and knowledge about some specific issues by relying on the support of more advanced colleagues and external consultants. At the same time, information from site visits can serve to identify suitable peer PES to offer support in the specific field. In a similar manner the choice of experts for a **Thematic Review Workshop (TRW)** or a **Working Group** can be based on experiences from site visits. Both the maturity of a particular PES or the change efforts in a specific area can motivate the participation in one of these formats. Approaches of PES

¹⁵ For the PES Network Work Programme 2023-2024, see: <https://ec.europa.eu/social/BlobServlet?docId=26646&langId=en>

that have found to be good practices during the site visits can also serve as starting points for **Study Visits**. Here, the host PES can present its approach to a specific topic to a group of up to ten participating PES. Other ML formats are **Webinars** as a web-based forum for virtual discussions among PES, the annual **Network Seminar** and the annual **PES Network Conference**. Although these formats are not strictly linked to the Benchmarking of the site visits, information on PES, their good practices and needs collected in this process can serve as valuable input for the composition of participants and choice of contributions.

To further and more systematically link the elements of ML and Benchmarking an additional format of Mutual Learning was introduced during the 2nd cycle, the **Thematic Learning Dialogues (TLDs)**. In these two-day events, a group of up to five participating PES develops concrete projects and change plans with set milestones immediately related to topics that were pointed out as potential areas of improvement during the previous assessment. In this planning process they are supported by members of the host PES and the so-called 'supporting PES' of the TLD, which have been found to be particularly advanced in the corresponding field as well as peers from other PES displaying a high maturity in this field. The plans drawn up by the participating PES are then followed up with regard to their implementation and progress during the site visit of the next Benchlearning cycle. This way, an evidence-based form of learning is established among peers which aims at inspiring and supporting concrete changes among the participating PES as an integral part of the Benchlearning visits.

To document the insights gained during the various activities, the **PES Knowledge Centre**¹⁶ has been established. This platform disseminates the key outputs and learning resources of the PES Network and is available to the wider public. Apart from the PES practices' learning fiches, analytical papers on various topics (e.g., on 'Activation of the inactive', 'PES Partnership Management, and 'The roles of PES in supporting structural change') Practitioner's Toolkits on various topics such as 'knowledge management' are published there. At the time of writing, almost 200 documents are stored in the PES Knowledge Centre. Apart from that, over 230 PES Practices¹⁷ were selected during the site visits of the ongoing Benchlearning process and developed into 'learning fiches'. Additional information, e.g., Summary Reports of the external Benchlearning visits, PES data, visualisation of performance results, maturity levels and learning topics of PES can be found on the PES-Dashboard¹⁸ and on a specific space on CIRCABC, the collaborative platform of the European Commission.¹⁹ The access to these two platforms is restricted.

¹⁶ European Commission (Undated), PES Knowledge Centre, *website*. Available at: <https://ec.europa.eu/social/main.jsp?catId=1163&langId=en>.

¹⁷ European Commission (Undated), Pes Practices, *website*. Available at: <http://ec.europa.eu/social/main.jsp?catId=1206&langId=en>.

¹⁸ Pes Benchlearning (Undated), Pes Benchlearning, *website*. Available at: <http://dashboard.pes-benchlearning.eu>.

¹⁹ CIRCABC (Undated), PES Network, *website*. Available at: <https://circabc.europa.eu/ui/group/07b8b6b8-b6eb-48ac-9065-0087da7599df>.

3 CONCLUSION: ADDED VALUE FOR PES

Well-functioning labour markets are essential for the functioning and the resilience of the European economies and societies. PES play a major role in addressing labour market challenges by providing services for jobseekers and employers, thereby functioning as a key actor in the employment services ecosystem, as highlighted in the current PES Strategy.²⁰

To better respond to changing environments and labour markets, PES in Europe confirmed their will to strengthen cooperation in the PES Network, thus contributing to European employment strategies and the European Pillar of Social Rights, improving labour market adjustment and integration. The Benchlearning approach is one of the core elements within the system of cooperation among PES in Europe, supporting them to improve performance and adjust processes and service delivery to customers by sharing knowledge and experiences in a systematic way based on evidence.

Excellent PES performance is essential to integrate youth into the labour market, reduce long-term unemployment, provide support to vulnerable groups, foster gender equality, mitigate skills shortages and promote employment growth, as well as achieve all the associated targets mutually agreed at European level. Performance varies between PES as do their mandates, the approaches to governance, leadership, quality management and the design of operational processes. The Benchlearning establishes an evidence-based self-sustaining system of continuous and measurable performance improvements in PES.

PES Benchlearning, as an iterative process, implies a gradual evolution in PES performance, and involves an approach that builds on its past achievements to create better results. Implementation of the PES Benchlearning concept in 2015-2022, its further refinements in 2023, and the results achieved so far, show a progressive ownership of the Benchlearning methodology by the PES in Europe, with the aim of identifying which operational modalities and practices work best in national and local labour markets. The latter varies across the EU, with groups of PES facing different labour market determinants, as well as challenges to address.

This approach serves as a basis for further targeted mutual learning activities. Continuity of the process will allow PES to involve more staff, to improve progressively the overall working culture and knowledge, and to provide an opportunity to transfer a rise of the individual competence into overall institutional competence.

Those PES that are open to the idea of change, willing to learn from their peers and share experiences with them, can benefit a lot from involvement in the Benchlearning process. Every activity, whether it is data collection or the site visit, includes elements of learning, from the activity itself and the PES peers involved in it.

In the upcoming 4th cycle, a new focus has been placed on user-friendliness and practicality of all outputs of the Benchlearning Methodology. The guiding idea for the revision of the methodology of the quantitative analysis was to produce insights that are directly relevant for PES managers and PES practitioners at national and local level. Towards this objective, the eight mandatory indicators will be complemented with others, leading to the compilation of the next edition of the Annual PES Report. Through the development of the forthcoming report, the conceptual framework will be further refined in the next revision of this Manual.

²⁰ Europa EU (Undated), PES Network Strategy, *website*. Available at: <https://op.europa.eu/webpub/empl/pes-network-strategy/en/>.

In a similar manner, also the assessment process has been refined over the three cycles of Benchlearning so far. Its processes have been adapted to the changing focus of the different cycles and emerging challenges following the “new normal” of the post-Covid era, and also the excellence model has undergone a targeted revision prior to the 4th cycle. To ensure the continued relevance of the model, this process of revision of the excellence model will be repeated in the future, to represent emerging changes in both labour markets and PES.

The self-assessment provides an opportunity for PES to step back from their day-to-day work and have an in-depth look at their organisation. The Benchlearning PES site visits including preparatory phase and follow-up create many opportunities for PES to pick up new ideas for enhancing their management and processes, no matter if they are carried out in an on-site or a virtual format.

Benchlearning assessment Summary Reports produced for all the PES that were visited as a ‘helping hand’ identify a number of areas for improvements. These reports include specific recommendations and indicate peer PES as potential partners for exchange and learning.

The set of TLDs which were based on evidence gained in the 3rd assessment cycle has proven to offer relevant, targeted and practical support to PES by making full use of experiences from well-advanced PES and from highly competent peers. In addition to the exchange between host PES representatives and peers during the assessment visits TLDs are a core element for strengthening and encouraging co-operation between PES as described in the current PES Strategy.²¹

²¹ *Ibid.*

4 USEFUL LINKS TO PES NETWORK SERVICES

PES dashboard	BL	Access is restricted to the EU PES Network members. Credentials to enter the dashboard can be asked via pes.benchmarking.fwc@it.ey.com
PES Knowledge Centre		http://ec.europa.eu/social/main.jsp?catId=1163&langId=en
PES Practices		http://ec.europa.eu/social/main.jsp?catId=1206&langId=en
PES Network's Work Programme 2023-2024		https://ec.europa.eu/social/BlobServlet?docId=26646&langId=en

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ANNEX I. EXCERPT OF THE SELF-ASSESSMENT TEMPLATE FOR THE 4TH ASSESSMENT CYCLE (ENABLER A1 AND ANNEX ON IMPACT OF THE PARTICIPATION IN THEMATIC LEARNING DIALOGUES)

Section	A. Strategic performance management						
Performance enabler	A1. <i>Establishing the fundamentals of performance management by target-setting</i>						
Description	<p>Ideally, a PES sets ambitious targets in a process that is</p> <ul style="list-style-type: none"> • simple and efficient; • informed by systematic analyses of the labour market; • strictly linked to organisational and strategic objectives; • responding to challenges in the global and regional environment; • creates value for customers,²² stakeholders and staff; and • involves regional/local units in a way that allows them to mutually agree on the extent to which they can contribute to achieving national targets, given local economic and labour market circumstances. <p>Local issues can be addressed through additional targets, maintaining a small and tractable number of targets. Targets are well communicated to all relevant levels of the organisation so that they are perceived as “personal missions to be accomplished” for each employee. Responsibilities for all these activities are clearly defined to ensure accountability. The performance management system (objectives, targets, indicators) is reviewed regularly and updated if necessary.</p>						
I. Implementation							
Phase	Description	No evidence or just some ideas	Some weak evidence, related to some areas	Some good evidence related to relevant areas	Strong evidence related to most areas	Very strong evidence related to all areas	Excellent evidence (= full compliance with excellence), related to all areas
		1	2	3	4	5	6

²² The term ‘customer’ is used consistently to designate the two main clients of PES, i.e., jobseekers and employers. PES Network members use different terminology in their national systems, such as beneficiary, client or user.

Plan	Mark the relevant column						
	Describe how planning is based on the organisations'/clients'/stakeholders' needs and expectations. Planning is deployed throughout the relevant parts of the organisation, on a regular basis.						
Do	Mark the relevant column						
	Describe how execution is managed through defined processes and responsibilities and diffused throughout the relevant parts of the organisation, on a regular basis.						
Check	Mark the relevant column						
	Describe how defined processes are monitored against relevant indicators and reviewed throughout the relevant parts of the organisation, on a regular basis.						

Act	Mark the relevant column						
	Describe how corrective and improvement actions are taken based on the results of the above processes throughout the relevant parts of the organisation, on a regular basis.						

IMPACT OF THE PARTICIPATION IN THEMATIC LEARNING DIALOGUES

I.1 In which Thematic Learning Dialogue(s) did representatives of your PES take part as learning participants rather than hosts?

TLD 1: _____

TLD 2: _____

I.2 Please describe the status of the activity plan you developed following the TLDs:

TLD 1: _____

Action(s):

TLD 2: _____

Action(s):

I.3 Please assess the impact of the follow-up activities related to the Thematic Learning Dialogues so far:

	The impact was		
	High	Medium	Low
Name of enabler:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name of enabler:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name of enabler:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name of enabler:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name of enabler:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ANNEX II. CONSTRUCTION OF INDICATORS FOR ORGANISATIONAL MATURITY

Information for qualitative benchmarking were collected using a tailor-made CAF-model for PES. A core element of this model is the PDCA-cycle (Plan, Do, Check, Act), which formed the basis of the scoring process. In a first step, each PES conducted a self-assessment. This self-assessment was validated during the external assessments between 2020 and 2023 and the assessment teams assigned external scores in order to derive an assessment of each organisation that is comparable across countries. The following seven sections (A-G) comprising 25 single performance enablers listed below will be part of the fourth cycle of assessments:

A. Strategic performance management

- A.1 Establishing the fundamentals of performance management by target-setting
- A.2 Translation of targets into key performance indicators and measurement
- A.3 Following up performance measurement
- A.4 Making use of the results of performance management

B. Design of operational processes

- B.1 Process definition and standardisation
- B.2 Information and communications technology (ICT) and data management
- B.3 Quality management
- B.4 Channel management and blended services

C. Sustainable activation and management of transitions

- C.1 Outreach, profiling and segmentation
- C.2 Individual action plan and ALMP measures
- C.3 Early intervention to avoid unemployment
- C.4 Implementation of services

D. Relations with employers

- D.1 Employer strategy
- D.2 Specialised unit for employer services
- D.3 Matching vacancies and jobseekers

E. Evidence-based service design and change management

- E.1 Evidence-based service design and implementation
- E.2 Pilot projects
- E.3 Management of change and innovation

F. Management of ecosystem

- F.1 Identification and structuring of relevant stakeholders
- F.2 Partnership building and managing
- F.3 Management of partnerships with service providers

G. PES resources and organisational resilience

- G.1 HR strategy, management and corporate culture

G.2 Empowerment of staff

G.3 Organisational resilience and business continuity

G.4 Budget allocation and use

From the externally validated scores, quantitative indicators are generated for each potential performance enabler, designed to reflect the proximity of each PES to the theoretically defined excellence level. This proximity can also be considered the maturity of the organisation with respect to a given benchmark. The following aggregation rule is used for the construction of quantitative indicators for each potential performance enabler:

- A **mature** organisation with respect to the potential performance enabler X is achieved if all four external scores in the PDCA cycle are 5 or higher.
- A **well-developed** organisation with respect to the potential performance enabler X is achieved if at least three of the four external scores are 4 or higher.
- A **developing** organisation with respect to the potential performance enabler X is achieved if at least three of the four external scores are 3 or higher.
- In all other cases, the maturity of the organisation is considered **developable**.

This yields an indicator “maturity regarding performance enabler X” with four values (1 = developable, 2 = developing, 3 = well-developed, 4 = mature). Similar rules apply to the aggregation of the scores across potential performance enablers in each of the seven sections and further on across all sections. The rules for aggregation to maturity levels for performance enablers, sections and overall are summarised here:

For each enabler:

- Mature (4): All four scores are 5 or higher
- Well-developed (3): At least three of the four scores are 4 or higher
- Developing (2): At least three of the four scores are 3 or higher
- Developable (1): All other cases

For sections:

- Section A: 4 enablers
 - Mature (4): All four enablers are “mature”
 - Well-developed (3): At least three of the four enablers are “well-developed” or higher
 - Developing (2): At least three of the four enablers are “developing” or higher
 - Developable (1): All other cases
- Section B: 4 enablers
 - Mature (4): All four enablers are “mature”
 - Well-developed (3): At least three of the four enablers are “well-developed” or higher
 - Developing (2): At least three of the four enablers are “developing” or higher
 - Developable (1): All other cases
- Section C: 4 enablers
 - Mature (4): All four enablers are “mature”

- Well-developed (3): At least three of the four enablers are “well-developed” or higher
- Developing (2): At least three of the four enablers are “developing” or higher
- Developable (1): All other cases
- Section D: 3 enablers
 - Mature (4): All three enablers are “mature”
 - Well-developed (3): At least two of the three enablers are “well-developed” or higher
 - Developing (2): At least two of the three enablers are “developing” or higher
 - Developable (1): All other cases
- Section E: 3 enablers
 - Mature (4): All three enablers are “mature”
 - Well-developed (3): At least two of the three enablers are “well-developed” or higher
 - Developing (2): At least two of the three enablers are “developing” or higher
 - Developable (1): All other cases
- Section F: 3 enablers
 - Mature (4): All three enablers are “mature”
 - Well-developed (3): At least two of the three enablers are “well-developed” or higher
 - Developing (2): At least two of the three enablers are “developing” or higher
 - Developable (1): All other cases
- Section G: 4 enablers
 - Mature (4): All four enablers are “mature”
 - Well-developed (3): At least three of the four enablers are “well-developed” or higher
 - Developing (2): At least three of the four enablers are “developing” or higher
 - Developable (1): All other cases

For complete PES:

Core sections: A, B, C and D

Auxiliary sections: E, F and G

Matured (4):

- At least three of the seven sections are “mature”, and the remaining are at least “developing”
- OR
- At least one of the four core sections is “mature” and the other core sections are at least “well-developed” and all auxiliary sections are at least “well-developed”

Well-developed (3):

- At least three of the four core sections are at least “well-developed”, and all auxiliary sections are at least “developing”

OR

- At least two of the four core sections are at least “well-developed” and at least two of the auxiliary sections are at least “well-developed” and no “developable” section exists

Developing (2):

- At least three of the four core sections are “developing” and at least two of the three auxiliary sections are “developing”

Developable (1): All other cases

