**TERMS OF REFERENCE**

**Position Title:** **Local Expert (LE) on Gender Mainstreaming & Budgeting - Portugal  
Project Title:** Gender Mainstreaming in Public Policy and Budget Processes **II (2025–2027)**  
**Location:** Portugal, Lisbon; with missions to other EU Member States  
**Job type:** Consultant (contract-based)  
**Duration:** 100 working days  
**Starting date:** October, 1st, 2025  
**Application deadline:** September, 21st, 2025

# 1. Expertise France

Expertise France (EF), part of the Agence Française de Développement (AFD) Group, is the French public agency for international technical cooperation and the second largest cooperation agency in Europe.

EF designs and implements projects in more than 100 countries to support partner institutions in governance, public finance, health, education, climate action and gender equality. With long-standing experience in EU-funded programmes, EF has played a leading role in promoting gender equality across public administrations, notably through its implementation of the European Commission’s “Gender Flagship” projects, which supported several Member States in strengthening gender-responsive budgeting, gender impact assessments and gender mainstreaming practices.

By combining policy expertise, capacity development, and knowledge capitalisation, EF has established itself as a reference partner for advancing reforms that integrate gender equality into public policy and budgetary processes.

# 2. The Project

The “Gender Mainstreaming in Public Policy and Budget Processes 2025–2027” project, financed by the European Union under the Technical Support Instrument (TSI), is implemented by Expertise France in close cooperation with the European Commission’s SG REFORM and the national Beneficiary Authorities in France, Germany, Malta and Portugal. The project runs over an operational period of 18 months (September 2025 – February 2027).

In Portugal, the project supports the Commission for Citizenship and Gender Equality (CIG), in cooperation with the Ministry of Finance, to strengthen gender-responsive budgeting and gender impact assessment tools. Building on progress made under TSI 2022, the project will refine Annex XXI of the State Budget, improve methodologies for gender impact assessments (GIA) and gender analysis (GA), and strengthen the systematic use of sex-disaggregated data across ministries. It also aims to reinforce the capacity of civil servants and focal points in key sectors to apply gender budgeting, gender analysis, and gender-responsive procurement.

Overall Objective:  
The project’s overall aim is to strengthen the institutional and administrative capacity of the participating Member States to integrate gender equality into public policies, budgeting processes, and public procurement systems, thus contributing to more transparent, efficient and inclusive governance.

Specific Objectives:

1. Support the City of Paris in piloting and scaling gender-responsive budgeting within the Public Health Department.
2. Equip the French State Procurement Department (DAE) with tools and guidance to integrate gender considerations into public procurement, particularly in the digital and green sectors.
3. Consolidate and harmonise gender equality instruments in the Federal States of Berlin and Hamburg, building on reforms launched under previous TSI support.  
   Strengthen Malta’s Gender Equality and Mainstreaming Strategy by enhancing the capacity of Gender Focal Points, developing a gender data portal, and piloting gender-responsive budgeting.
4. Improve Portugal’s implementation of its national equality strategy by refining Annex XXI of the State Budget, enhancing gender impact assessments, and reinforcing sectoral capacity building.

Expected Outcomes:

By the end of the project, participating authorities are expected to have:

1. Stronger institutional frameworks to mainstream gender equality across policies and budgets. Improved availability and use of sex-disaggregated data for decision-making.
2. Practical tools, pilots and guidelines enabling the application of gender-responsive budgeting, gender impact assessments, and gender-responsive public procurement.
3. Increased capacity of civil servants through tailored training and awareness-raising programmes.
4. Documented good practices and policy briefs enabling knowledge sharing within and beyond the participating Member States.

Timeline and Key Milestones:

The project runs over an operational period of 18 months (September 2025 – February 2027). Implementation is structured in successive phases, each comprising specific deliverables and activities:

1. Inception Phase: fact-finding missions, baseline analysis, and preparation of the Inception Report.
2. Country-Specific Support Phase: tailored technical assistance to Beneficiary Authorities, including pilots, guidelines, capacity building, and awareness-raising activities.
3. Capitalisation Phase: consolidation of results, preparation of policy briefs, case studies, and cross-country knowledge products.

Closure and Dissemination Phase: organisation of national closure events and a final dissemination conference at European level.

# 3. Position Description

To ensure high-quality implementation, the project is structured around three complementary pillars: the Central Management and Coordination Team, the Local Experts (LEs), and a pool of Short-Term Experts (STEs) mobilised on demand.

* The Central Management and Coordination Team includes a Head of Project, who provides overall leadership, coordination and technical guidance; a Key Expert on Gender Responsive Budgeting (GRB), who ensures methodological quality and supervises the pool of LEs together with the STEs; a Project Manager, responsible for contractual, financial and administrative oversight; and a dedicated support team, composed of an Administrative and Financial Officer and a Project Assistant, providing logistical and financial management.
* The Local Experts form the project’s frontline, working in close partnership with Beneficiary Authorities (BAs). They ensure that methodologies and tools are adapted to national and local contexts, provide tailored technical assistance and capacity building, and act as liaison between Expertise France and the BA.
* Short-Term Experts (STEs) are mobilised during peak periods or for specialised contributions (e.g. gender impact assessment, MEAL, capitalisation, communication), complementing the work of the central team and the LEs by bringing targeted expertise.

**This position is dedicated to providing tailored support to the Commission for Citizenship and Gender Equality (CIG), in close cooperation with the Ministry of Finance.**

Portugal has made important progress under the TSI 2022 Gender Flagship, which enabled the country to initiate the implementation of gender budgeting at central government level. This included the adoption of Annex XXI in the State Budget, consolidating reporting on SDGs, environment and gender equality, the development of a monitoring template to track gender-related budget measures, and the preparation of a Gender-Sensitive Budgeting Action Plan (2025–2030). The project also strengthened the institutional capacity of the Commission for Citizenship and Gender Equality (CIG), including its network of Gender Equality Councillors and ENIND focal points, and trained 368 civil servants in Gender Impact Assessment (GIA) and Gender Responsive Budgeting (GRB). These advances laid a strong foundation for integrating gender perspectives into budgetary processes and policy debates.

However, significant gaps remain in the systematic application of gender analysis and impact assessments, particularly in sectoral and legislative processes; in the availability and use of sex-disaggregated data across ministries; and in the capacity of public administration staff to apply gender mainstreaming tools consistently. The current project will therefore build on the TSI 2022 achievements by refining methodologies (e.g., Annex XXI and GIA processes), strengthening data systems through a diagnostic report and recommendations, and reinforcing the capacity of civil servants and focal points across key sectors. This approach will consolidate the progress already made and ensure sustainability and broader uptake across public administration.

# 3.1. Objectives

# The Local Expert will contribute to the design and implementation of project activities in Portugal, providing tailored technical support to the Commission for Citizenship and Gender Equality (CIG) in cooperation with the Ministry of Finance, and facilitating coordination with other national stakeholders to ensure ownership and sustainability of results.

# 3.2. Reporting Lines

The Local Expert will work under the overall supervision of the Head of Project, technical supervision of the Key Expert, and in close collaboration with Expertise France’s coordination team. The LE will liaise regularly with the BA, and other stakeholders as required.

# 3.3. Main Tasks & Responsibilities

a. Inception Phase:

Conduct desk research and fact-finding missions; review Annex XXI, existing GRB and GIA methodologies, and sex-disaggregated data practices. Map institutional gaps and sectoral needs across ministries. Produce the Inception Report with a comprehensive state of play for Portugal.

b. Tailored Technical Support:

Guide the refinement of Annex XXI of the State Budget, integrating gender analysis and sector-specific ex-ante and ex-post budget impact assessments. Develop recommendations to strengthen gender impact assessment processes in legislation and policymaking. Prepare a diagnostic report on sex-disaggregated data across three to four sectors and propose a strategy for systematic collection and monitoring. Produce a tailored support report with recommendations and next steps.

c. Capacity Building and Awareness Raising:

Conduct a training needs assessment with CIG and ministries. Develop a training kit (needs assessment, modules, toolkits, evaluation tools) on gender budgeting, gender analysis, impact assessments, and gender-responsive procurement. Deliver training sessions in three to four priority sectors (e.g., environment, mobility, housing, agriculture, finance). Assess effectiveness and sustainability through evaluations and follow-up.

d. Coordination:

Maintain regular communication and hold coordination meetings with Expertise France, CIG, the Ministry of Finance, and line ministries to ensure coherence, alignment, and ownership of project activities.

e. Monitoring, Evaluation, Accountability and Learning (MEAL):

Submit mission reports, contribute to regular progress reports, and provide inputs for capitalisation products and the final outputs of the project.

# 3.4. Key Deliverables

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| Component / Output | Deliverable[[1]](#footnote-1) | Timeline |
| 1. Inception Phase | Inception Report- Portugal | Month 2 |
| 1. Tailored Technical Support | Tailored Support Report (refinement of Annex XXI, diagnostic on sex-disaggregated data, recommendations on GIA) | Months 3-10 |
| 1. Capacity Building and awareness raising | Training kit (needs assessment, modules, toolkits, evaluation tools); training delivery and evaluation report | Months 4-12 |
| 1. Coordination | Meeting Minutes | Throughout the project |
| 1. MEAL | Mission and progress reports | Every 3 months |
| Contributions to case studies and final report | Months 3- 15 |

# 4. Candidates’ Qualifications and Experience

4.1 Education

Advanced university degree in Public Policy, Public Administration, Economics, Public Finance, Gender Studies, Political Science, or related field.

4.2. Professional Experience

At least 8 years’ professional experience in public policy, public administration, or public finance, including a minimum of 5 years in gender mainstreaming in public policy and budgeting. Demonstrated experience liaising with central administrations (e.g., ministries of finance, equality bodies, or national statistics offices). Proven track record in developing or refining gender budgeting tools (e.g., budget annexes such as Annex XXI, monitoring templates), gender impact assessments, or methodologies for sex-disaggregated data. Experience in capacity building and training of civil servants and/or equality focal points. Familiarity with applying GRB and GIA in sectoral contexts (e.g., environment, mobility, housing, agriculture, finance) will be considered a strong asset.

4.3. Languages

Fluency in Portuguese and English; knowledge of other EU languages is an asset.  
  
4.4. Core Competencies

Strong results orientation, teamwork, communication and diplomatic skills, stakeholder engagement, adaptability, and commitment to knowledge sharing and continuous learning. Excellent writing skills in both Portuguese and English, with the ability to produce clear, correct, and well-structured reports, training materials, and policy documents.  
  
4.5. Technical Skills

In-depth knowledge of EU and Portuguese gender equality frameworks, particularly the National Strategy for Equality and Non-Discrimination (ENIND 2018–2030), gender-responsive budgeting, and gender impact assessment methodologies. Familiarity with tools such as Annex XXI of the State Budget and monitoring systems for sex-disaggregated data. Advisory and analytical capacity to refine methodological tools, produce policy guidance, and design training materials.

IT proficiency: Advanced command of Microsoft Office (Word, Excel, PowerPoint) for reporting, analysis, and presentations; familiarity with project management tools; ability to analyse datasets using Excel or statistical software; and fluency with online collaboration platforms.

# 5. Application Procedure

5.1. Application dossier

The dossier must include: CV (preferably in EU format), Candidature Form, Cover Letter, 3 References, Daily Rate, and a 2-page Work Plan outlining understanding of the ToR, proposed approach, and indicative timeline. Only complete applications will be considered. Shortlisted candidates will be invited to an interview.

# 5.2. Evaluation of Applications

Applications will be assessed through a transparent scoring grid.

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| Criteria | Weighting | Scoring Scale | Max. Points |
| Education | 15% | 0–15 | 15 |
| Professional experience | 30% | 0–30 | 30 |
| Languages | 10% | 0–10 | 10 |
| Core competencies | 10% | 0–10 | 10 |
| Technical skills | 20% | 0–20 | 20 |
| Work Plan Quality | 15% | 0–15 | 15 |
| TOTAL | 100% |  | 100 |

Each application will be reviewed and scores will be averaged. Candidates scoring 70 points or more will be shortlisted for interviews. In case of a tie, preference will be given to candidates with stronger experience in gender-responsive budgeting, gender impact assessments, and institutional capacity building within central administrations in Portugal.

1. The Local Expert’s daily rates payment by EF is linked to the validation of the deliverable by EF and approval by the BA, upon validated monthly timesheet. Local Experts must submit a monthly timesheet indicating the working days consumed and deliverables produced. Payment is made only after validation of the timesheet by Expertise France. [↑](#footnote-ref-1)