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**GENDER
FLAGSHIP**

GENDER MAINSTREAMING
IN PUBLIC POLICY
AND BUDGET PROCESSES

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About the project

This case study was prepared as part of the project “**Gender mainstreaming in public policy and budget processes**” (hereafter referred to as the “**Gender Flagship Project**”, funded by the European Union via the Technical Support Instrument (TSI). The project is implemented by Expertise France (EF) with the support of the European Commission, SG REFORM, in partnership with the European University Institute (EUI) and the European Institute for Gender Equality (EIGE).



Implementation period: 49 months (June 2022 to July 2026)

Beneficiary Member States: Cyprus, France, Germany, Ireland, Italy, Greece, Portugal, Romania, Spain

Key activities: Technical methodological support, capacity building through trainings, workshops and study visits, dissemination and capitalisation

Implementation:

Funder: EU (SG REFORM) through TSI

Implementer: Expertise France, in collaboration with European University Institute (EUI) and European Institute for Gender Equality (EIGE)

The Gender Flagship Project aims to support Member States in understanding how to advance gender equality by better mainstreaming gender into their policies and budgeting, as well as address any related gaps. It offers technical support for analysing policies and budgets with a focus on gender mainstreaming, ensuring that all citizens, regardless of gender, have the opportunity to fully participate in and contribute to a fair society.

The project works with twelve Beneficiary Authorities (BAs) across nine Member States over a 49-month period (2022-2026). Each BA receives:

- In-depth analysis of current practices and development of tailored Gender Action Plans;

- Technical support from dedicated Local Experts and core Gender Flagship Project team experts to build capacity and implement tools, such as developing and improving their equality-related programmes and indicators, enforcing gender mainstreaming through developing specific processes (e.g. circulars), developing gender-responsive budgeting methodologies.

In addition, the Gender Flagship Project provides capacity development through general online training and specific in-person training on the latest trends, methodologies and tools for effective gender mainstreaming. The project also facilitates peer learning and exchanges between countries through study visits and workshops, helping Member States to enhance their targeted approaches in specific sectors, policy areas and/or regions.



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Abbreviations and Acronyms

- BA** Beneficiary Authority
- CEDAW** Convention on the Elimination of All Forms of Discrimination Against Women
- CIG** Commission for Citizenship and Gender Equality
- CITE** Commission for Equality in Labour and Employment
- DGO** Directorate-General for Budget
- EC** European Commission
- EF** Expertise France
- EIGE** European Institute for Gender Equality
- ENIND** National Strategy for Equality and Non-Discrimination (Estratégia Nacional para a Igualdade e a Não Discriminação)
- EU** European Union
- EUI** European University Institute
- GAP** Gender Action Plan
- GIA** Gender Impact Assessment
- GRB** Gender-Responsive Budgeting
- INA** National Institute of Administration (Instituto Nacional de Administração)
- INCoDe.2030** National Digital Competences Initiative 2030 (Iniciativa Nacional Competências Digitais e.2030)
- INE** National Institute of Statistics (Instituto Nacional de Estatística)
- PlanAPP** Centre for Public Administration Planning, Policy and Foresight (Centro de Competências de Planeamento, de Políticas e de Prospetiva da Administração Pública)
- SDGs** Sustainable Development Goals
- SG REFORM** Reform and Investment Task Force of the European Commission
- ToT** Training of Trainers
- TSI** Technical Support Instrument

Executive summary

Portugal joined the Gender Flagship Project to strengthen its institutional capacity to implement gender mainstreaming tools, particularly Gender-Responsive Budgeting (GRB) and Gender Impact Assessment (GIA). Despite a robust legal and policy framework, anchored in the National Strategy for Equality and Non-Discrimination (ENIND) and aligned with EU and international standards, practical challenges persisted in operationalising gender equality across public administration. These included inconsistent application of GRB, limited use of gender-disaggregated data, and uneven inter-ministerial coordination. The COVID-19 pandemic further exposed structural gender inequalities, reinforcing the urgency of building more inclusive and resilient governance systems.

With the support of the Gender Flagship Project, Portugal achieved three major results:

- A comprehensive **Action Plan for Strengthening GRB (2025–2030)**, drafted with technical support from Gender Flagship experts, providing a strategic roadmap to institutionalise gender-responsive budgeting system-wide through formal multi-institutional partnerships, measurable targets, and integrated reporting frameworks that position gender equality as a primary organising principle alongside climate and SDG considerations.
- **Enhanced budget reporting tools**, initially through improvements that Gender Flagship's experts worked on in relation to **Annex IX-A**, (a dedicated gender-responsive budgeting

annex within the annual State Budget Circular, completed by public entities during budget preparation) followed by support for the government's transition to the integrated **Annex XXI** (an integrated annex within the State Budget Circular framework), which consolidates gender equality, climate action, and SDG reporting while establishing mandatory requirements and gender-sensitive indicators across seven pilot budget programs.

- The development of **comprehensive training infrastructure**, including GRB and GIA manuals, Training of Trainers programs, and professional networks that expanded technical capacity across government and established the foundation for sustained integration into public service curricula and ongoing capacity-building cycles.

The Gender Flagship Project significantly contributed to consolidating gender-responsive budgeting in Portugal. The work took place under two different governments, requiring flexibility and adaptation, and providing continuity and reinforcing institutional commitment.

Looking ahead, priorities include strengthening collaboration with high-impact sectors such as environment and digital transition, finalising guidance on gender-responsive public procurement, and improving the availability and use of gender-sensitive data. Portugal's participation in the Technical Support Instrument (TSI) for 2025 will continue advancing these efforts, providing ongoing technical assistance to further institutionalise gender-responsive budgeting practices. Sustained coordination, institutional commitment, and investment in public sector training will be key to consolidating the gains achieved and embedding gender equality as a structural component of fiscal and policy decision-making.

Section 1

CONTEXT AND
RATIONALE FOR
SUPPORT

This section is mostly informed by the in-depth gender analysis undertaken in the beginning of the project, led by project's local expert Ana Sofia Fernandes, with technical guidance and input from Rezart Xhelo, key expert. It also benefited from substantial input from the BA (CIG)

1.1 Beneficiary Authority (BA)

The Commission for Citizenship and Gender Equality (CIG)¹ was the primary beneficiary of the Gender Flagship Project in Portugal. As the national body responsible for promoting gender equality, CIG operates under the Secretary of State for Equality and Migrations, within the Office of the Prime Minister. It coordinates the National Strategy for Equality and Non-Discrimination 2018–2030 (ENIND), which provides the strategic framework for promoting gender equality, preventing gender-based violence, and combating discrimination based on sexual orientation, gender identity and expression, and sexual characteristics.

CIG plays a central role in embedding gender considerations across governance. It works closely with ministries, local governments, civil society, academia, and international partners to ensure national alignment with legal and policy frameworks at all levels.

1.2. Context when joining the project

GOVERNANCE AND INSTITUTIONAL SETUP

Portugal's governance structure demonstrates a long-standing commitment to gender equality, supported by an institutional framework that operates at national and local levels. The Commission for Citizenship and Gender Equality (CIG) serves as the central mechanism for implementing gender equality policies. It coordinates the National Strategy for Equality and Non-Discrimination (ENIND)² and works across ministries and sectors to advance gender mainstreaming.

CIG's efforts are complemented by the Commission for Equality in Labour and Employment (CITE)³, which addresses discrimination in the workplace, including matters of equal pay and parental leave. Separately, the Portuguese Ombudsperson acts as the National Human Rights Institution and an independent equality body, promoting and defending fundamental rights, including equality between women and men.⁴ Legislative oversight is provided by the Parliamentary Subcommittee on Equality and Non-Discrimination⁵.

At the local level, gender equality advisors are appointed in municipalities under cooperation protocols with CIG. These partnerships have expanded, with 194 municipalities participating in the development of local equality plans. However, disparities in institutional capacity and resource availability across regions pose ongoing challenges to effective implementation.

¹ *Comissão para a Cidadania e a Igualdade de Género (CIG)*

² *Estratégia Nacional para a Igualdade e a Não Discriminação 2018–2030 (ENIND)*

³ *Comissão para a Igualdade no Trabalho e no Emprego (CITE)*

⁴ <https://www.provedor-jus.pt/en/>

⁵ *Subcomissão para a Igualdade e Não Discriminação da Assembleia da República*

While Portugal's institutional architecture is comprehensive, evaluations by the Committee on the Elimination of Discrimination against Women (CEDAW Committee)⁶ have pointed to coordination gaps, particularly between CIG and other entities, and underscored the need for more sustainable resourcing to support CIG's expanding mandate.

LEGISLATIVE AND POLICY FRAMEWORK

Portugal's legal foundation for gender equality is rooted in its Constitution, which affirms non-discrimination and mandates the State to promote equality between women and men. Building on this, the National Strategy for Equality and Non-Discrimination 2018–2030 (ENIND) consolidates three major action plans focused on gender equality, violence against women, and combating discrimination based on sexual orientation and gender identity.

ENIND promotes gender mainstreaming and intersectionality, supported by tools such as gender impact assessments, gender-responsive budgeting, and gender-sensitive public procurement. The strategy also integrates gender equality considerations into education, labour, health, and territorial governance.

Portugal is a party to key international instruments including CEDAW and the Istanbul Convention,⁷ and aligns its policy framework with EU strategies such as the Gender Equality Strategy 2020–2025. Despite this strong framework, implementation remains inconsistent. The use of gender-responsive budgeting and impact assessments is not yet systematic, and local-level mainstreaming efforts require further institutionalisation and support.

1.3. Reasons for the beneficiary's participation in the project

Portugal's participation in the Gender Flagship Project reflected a convergence of national priorities, legal commitments, and the need to address persistent institutional challenges in the implementation of gender equality policies. Although the country has developed a solid legal and policy framework—marked by State Budget Law No. 114/2017⁸ and further reinforced by Order No. 6687/2018⁹—translating these commitments into systematic and effective practices has remained an ongoing challenge. In particular, the full implementation of instruments such as Budget Annex IX-A, intended to embed gender considerations into budgetary planning, has been limited by insufficient integration with monitoring and control mechanisms within the Ministry of Finance.

⁶ *Convention on the Elimination of All Forms of Discrimination against Women. United Nations Office of the High Commissioner for Human Rights.*

⁷ *Council of Europe Convention on preventing and combating violence against women and domestic violence*

⁸ *Lei do Orçamento do Estado n.º 114/2017*

⁹ *Despacho n.º 6687/2018*

Section 1. CONTEXT AND RATIONALE FOR SUPPORT

The COVID-19 pandemic further highlighted the structural gender inequalities embedded in Portuguese society, including disproportionate impacts on women's labour market participation, income security, unpaid care responsibilities, and exposure to gender-based violence. These dynamics underscored the urgency of developing more resilient and gender-responsive public policies.

Within this context, the Commission for Citizenship and Gender Equality identified the need to reinforce institutional capacity for conducting gender impact assessments and applying GRB methodologies. The technical support provided by the Gender Flagship Project offered a strategic opportunity to address these gaps by fostering a coherent, evidence-based, and operationally grounded national approach to gender mainstreaming in public policy and budgeting.



The project came at a crucial time in Portugal's gender equality efforts. Although the 2017 Budget Law included a provision for gender-responsive budgeting (GRB), implementation had remained limited. A pilot project launched in 2018 lacked a strategic framework and capacity-building elements. By 2022, gender-responsive budgeting was still just an idea. Without the Gender Flagship project, the momentum around GRB might have faded altogether.



Project beneficiary

Additionally, Portugal's commitments under the EU Recovery and Resilience Facility and the Portugal 2030 Strategy (operational programme (OP) for EU funds)¹⁰ require the integration of gender equality as a cross-cutting priority. Participation in the project thus also served to align national practices with evolving EU standards and policy expectations.



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¹⁰ About the Portugal 2030: <https://portugal2030.pt/en/portugal-2030/o-que-e-o-portugal-2030/> . The text of the strategy: <https://files.dr.pt/1s/2020/11/22200/0001200061.pdf>

1.4. Project objectives and aims

The overarching aim of the Gender Flagship Project in Portugal was to consolidate the institutional and methodological foundations necessary for the effective integration of gender equality across the entire policy and budget cycle, with a particular focus on strengthening gender-responsive budgeting as a core instrument of public financial management.

To achieve this aim, the project pursued the following specific objectives:

- Institutionalise gender-responsive budgeting by embedding GRB practices into all stages of the State Budget process in alignment with the National Strategy for Equality and Non-Discrimination 2018-2030 (ENIND)¹¹, the Portugal 2030 Strategy¹², and the Strategy for Innovation and Modernisation of the State and Public Administration¹³.
- Strengthen institutional capacity to conduct robust gender impact assessments and apply them systematically to budget measures, policies, and programmes.
- Develop and implement a National Action Plan for GRB, setting clear governance arrangements, capacity-building pathways, and monitoring frameworks to ensure sustained and coordinated application of gender-responsive budgeting across government.
- Enhance inter-ministerial coordination and foster collaboration with civil society, local authorities, and sector-specific actors to ensure that gender considerations are mainstreamed in all budgetary and policy decisions.
- Expand and improve the use of sex-disaggregated data and gender-sensitive indicators, linking GRB to evidence-based policy evaluation and enabling targeted, results-oriented resource allocation.

Through these objectives, the project aimed to position GRB not as an isolated exercise, but as a structural principle guiding fiscal decision-making—ensuring that public resources are planned, allocated, and monitored in ways that actively promote gender equality and deliver more responsive, transparent, and equitable outcomes across all sectors of Portuguese society.

¹¹ <https://diariodarepublica.pt/dr/detalhe/resolucao-conselho-ministros/61-2018-115360036>

¹² <https://files.dre.pt/1s/2020/11/22200/0001200061.pdf>

¹³ <https://stip.oecd.org/stip/interactive-dashboards/policy-initiatives/2025%2Fdata%2FpolicyInitiatives%2F99996114>



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Section 2

GENDER
MAINSTREAMING
SUPPORT
PROVIDED

2.1. Tailored support and results achieved

2.1.1. ACTION PLAN FOR STRENGTHENING GENDER-RESPONSIVE BUDGETING (GRB): EMBEDDING GENDER PERSPECTIVES IN THE BUDGET CYCLE

ACTIVITY OVERVIEW

In 2024, with the support of expertise provided by the Gender Flagship Project, Portugal developed a medium-term Action Plan for Strengthening Gender-Responsive Budgeting (GRB) to guide implementation from 2025 to 2030. This initiative marked a shift from isolated pilot activities to a system-wide approach to gender-responsive budgeting. Developed in close coordination with the Ministry of Finance and supported by the Gender Flagship Project experts, the Plan builds on Decree-Law 10/2023¹⁴ and aligns with national frameworks such as ENIND, Portugal 2030, and the Strategy for Innovation and Modernisation of the State and Public Administration. It was developed as a strategic response to emerging gaps in existing GRB practices—such as those observed through the use of Annex IX-A (the gender-responsive budgeting reporting template attached to the annual State Budget Circular, requiring entities to identify and classify budget measures contributing to gender equality)—and aimed to institutionalise GRB by establishing clear governance structures, defining capacity-building needs, and enhancing data and methodological tools.

A key application of the Plan was to guide the design and implementation of Annex IX-A and then Annex XXI (a later budget annex introduced in the 2025 budget cycle to integrate gender equality alongside climate and SDG priorities within the State Budget Circular’s reporting requirements), introduced in the 2025 budget cycle to integrate gender equality alongside climate and SDG priorities. The Plan continues to serve as a reference for the operationalisation of Annex XXI across government.

RESULTS ACHIEVED

The Action Plan established a clear institutional framework for embedding GRB within public financial management. It clarified the roles of key actors, introduced proposals for a Technical Monitoring Group, and defined pathways for inter-ministerial coordination. It also set the stage for the development of a GRB Methodological Guide, common templates, and a national repository of gender indicators. By laying the technical and governance groundwork, the Plan helped institutionalise GRB within the State Budget cycle and ensure future alignment with national data and performance systems. Its strategic alignment with the forthcoming 2025–2030 National Gender-Sensitive Statistics Plan further positions GRB as a core component of evidence-based policymaking.

¹⁴ *Decreto-Lei n.º 10/2023 about the rules for the execution of the State Budget for 2023*

CHALLENGES AND LESSONS LEARNED

Persistent coordination gaps remain a barrier to effective implementation. Key institutional actors—such as Centre for Public Administration Planning, Policy and Foresight (PlanAPP), National Institute of Statistics (INE), and National Digital Competences Initiative 2030 (INCoDe.2030)—have not yet been systematically engaged. In addition, the absence of binding requirements or dedicated funding for GRB threatens the long-term viability of the Action Plan. Progress on cross-sectoral, gender-disaggregated indicators also remains uneven, underscoring the need for sustained investment in data systems and training.

For further details, see Annex. Spotlight Practice: Action Plan for Strengthening Gender-Responsive Budgeting (GRB).

2.1.2. REVISION OF BUDGET REPORTING TOOLS – ANNEX IX-A AND THE INTRODUCTION OF ANNEX XXI: EMBEDDING GENDER, CLIMATE, AND SDGS PRIORITIES INTO BUDGET REPORTING

ACTIVITY OVERVIEW

Budget annexes in Portugal serve as specialised reporting instruments that accompany the annual State Budget Circular, requiring public entities to identify and classify specific policy measures according to defined criteria. Budget annexes provide detailed quantitative information, breakdowns and forecasts of the government's revenue and expenditure. These annexes function as both planning tools—helping entities assess policy impacts during budget preparation—and monitoring instruments for tracking government-wide commitments.

Between 2023 and 2024, Gender Flagship Project's technical support was provided to the Ministry of Finance to revise and improve Annex IX-A of the State Budget Circular. Originally established in 2018 as part of Portugal's pilot project for gender-responsive budgeting, Annex IX-A served as a dedicated gender-responsive budgeting form within the State Budget Circular, requiring budget institutions to identify budget measures that could contribute to gender equality and classify them using a three-point scoring system. Entities completed this annex during annual budget preparation, providing both financial allocations and qualitative descriptions of expected gender impacts.

The revised Annex IX-A, published as part of the 2024 State Budget Circular, aimed to improve clarity, usability, and institutional engagement through enhanced instruction manuals and streamlined classification systems. The revision followed the established EC scoring methodology to track gender-related spending¹⁵ while making the tool more accessible to public entities through clearer guidance and simplified procedures.

However, practical implementation revealed persistent challenges including inconsistent reporting quality, limited monitoring capabilities, limited use of statistics and sex-disaggregated data, and fragmentation with other emerging budget priorities. In practice, public entities often struggled with conducting meaningful gender analysis during budget preparation, leading to superficial assessments and inconsistent application of gender classification criteria.

¹⁵ Score 2: interventions the principal objective of which is to improve gender equality; score 1: interventions that have gender equality as an important and deliberate objective (but not as the main reason for the intervention); score 0: interventions that do not have a significant impact on gender equality.; score 0+: interventions where the expected impact on gender equality was unclear.

Concurrently, the government's evolving approach to integrated policy reporting—seeking to consolidate gender equality, climate action, and SDG frameworks—led to the decision to transition from standalone annexes to a unified reporting system. This shift reflected broader governmental priorities to streamline budget processes while maintaining comprehensive coverage of cross-cutting policy objectives.

Annex XXI, introduced in the 2025 budget cycle, emerged from this context as a consolidated reporting tool that replaced multiple specialised annexes (including IX-A for gender, IX-B/IX-C for climate) with a single integrated instrument. This new annex requires entities to assess their budget measures across three dimensions—gender equality, climate action, and SDG contributions—using unified classification systems while preserving the detailed gender analysis methodology from Annex IX-A in its entirety.

In practice, public entities now complete Annex XXI during budget preparation by reviewing their proposed programs and measures, identifying those with potential gender/climate/SDG impacts, and providing standardised information including budget allocations, target populations, expected outcomes, and monitoring indicators across all three dimensions.

The partnership between CIG and the Ministry of Finance proved crucial throughout this evolution, ensuring that gender equality considerations remained visible and technically robust within the new integrated framework. This collaboration represented a milestone in consolidating gender-responsive budgeting in Portugal, expanding institutional participation while strengthening the legitimacy of the initiative.

RESULTS ACHIEVED

The revised Annex IX-A demonstrated improved institutional engagement in 2024. Under Annex IX-A, reporting public entities were required to identify relevant budget measures and apply an EU-aligned scoring for the gender perspective (scores 0*/1/2)¹⁶, alongside the associated budget amounts and a brief qualitative description. In 2024, 150 public entities assessed 564 measures, amounting to €426.27 million. While only 5% of the reported budget was allocated to measures where gender equality was identified as the main objective, 81% included gender as a secondary consideration—reflecting growing awareness across government entities about gender impacts of budget measures, though indicating room for more strategic targeting and deeper analysis.

The transition to Annex XXI in 2025 maintained continuity in gender-responsive budgeting methodology while achieving notable improvements in both participation and quality. 120 public entities reported 257 measures totalling €718.34 million, representing a significant increase in average budget allocation per measure. Most significantly, 37% of the total budget was allocated to measures where gender equality was identified as the main objective—a substantial improvement from the previous 5% in 2024, possibly signalling enhanced institutional understanding and more strategic prioritisation of gender considerations during budget planning processes.

The preservation of Annex IX-A's complete gender equality framework within Annex XXI ensured methodological continuity while the integration with climate and SDG reporting created opportunities for identifying intersectional impacts and policy synergies. This approach maintained the technical integrity of gender-responsive budgeting procedures while positioning them strategically within broader government priorities.

¹⁶ Score 2: Improving equality between women and men is the main objective of the intervention, without which the intervention would probably not be carried out. Score 1: Intervention in which equality between women and men is an important and deliberate objective, but not its main reason. Score 0*: Interventions that may have an important impact on equality between women and men, but whose real impact is not yet clear, due, for example, to the absence of a gender analysis at the design stage or the absence of data that would allow a more detailed assessment of the intervention's effects.

CHALLENGES AND LESSONS LEARNED

Despite advances, the quality and consistency of submissions remain uneven. Many entities still frame gender equality as a secondary or indirect objective. Moreover, reporting through Annex XXI is not yet formally linked to performance evaluations or budget reallocations, limiting its influence. These findings reaffirm the need for continued training, sector-specific gender analysis, adaptation, and better integration with the tools and processes established through the Action Plan.

2.1.3. TRAINING MANUALS ON GENDER-RESPONSIVE BUDGETING (GRB) AND GENDER IMPACT ASSESSMENT (GIA): BUILDING CAPACITY FOR GENDER MAINSTREAMING IN PUBLIC POLICY

ACTIVITY OVERVIEW

To support the institutionalisation of gender mainstreaming tools, two training manuals on *Gender-Responsive Budgeting (GRB)* and *Gender Impact Assessment (GIA)* were developed under the Gender Flagship Project, focused on the digital transition. Informed by technical content delivered in 2024 training sessions and sector-specific pilots, the manuals serve as practical, modular resources tailored for civil servants. They were designed to be flexible, user-friendly, and replicable across policy areas and government levels.

In parallel, a *Training of Trainers (ToT)* programme was delivered in 2023 to equip a core group of 21 trainers—primarily from CIG and partner entities—with the skills to replicate GRB and GIA trainings nationwide. The manuals were directly integrated into the ToT and will be incorporated into the National Institute of Administration’s (INA)¹⁷ formal curricula to ensure long-term institutional uptake.

RESULTS ACHIEVED

The production of the manuals and delivery of the ToT programme significantly strengthened Portugal’s capacity to mainstream gender across public administration. To date, these tools have supported training for more than 1300 public administration professionals. Specialised sessions tailored to sectors such as environment, digital transition, and public finance increased the relevance and applicability of GRB and GIA tools. The manuals consolidate international best practices into context-specific guidance and include session plans, trainer notes, and practical exercises.

CHALLENGES AND LESSONS LEARNED

Pilot applications revealed that standard training content must be carefully adapted to sectoral contexts, languages, and operational realities. A one-size-fits-all approach risks limiting uptake and relevance. While the manuals represent a strong technical resource, their long-term impact will depend on formal endorsement, integration into public service curricula, and linkage to career incentives. In some ministries, practical uptake has been hindered by the absence of mandates and accountability mechanisms. Future efforts should prioritise institutional ownership, feedback loops, and alignment with ongoing reforms in public sector training.

¹⁷ Instituto Nacional de Administração (INA)

2.2. Capacity-building activities

The Gender Flagship Project contributed to a comprehensive capacity-building program that trained more than 1300 officials across Portuguese government ministries, agencies, parliamentary bodies, and municipalities between 2023 and 2025.

Training evolved strategically alongside Portugal's budget reporting tools, beginning with Annex IX-A implementation sessions that reached 591 planning and budgeting specialists across sector ministries through online and in-person formats. The program successfully partnered with national institutions, particularly the National Institute of Administration (INA), which delivered training to 216 participants from 30 entities, demonstrating effective integration with existing civil service development frameworks.

The program expanded beyond budgeting to include Gender Impact Assessment (GIA) training, reaching 62 participants across government ministries, parliamentary bodies, and municipalities through online introductory sessions and intensive in-person workshops. Most significantly, the program adapted to support the transition to Annex XXI, delivering five technical sessions to 416 planning and budgeting specialists in May 2025, ensuring continuity despite changing technical requirements.

The blended delivery approach—combining broad online sessions with targeted in-person training for key institutional partners and specialised sectors—proved particularly effective. Specialised sector-focused training addressed high-priority areas such as environment and digital transition, while core institutional capacity was strengthened through dedicated sessions for CIG and DGO officials. The program's adaptability and sustained multi-year engagement created a comprehensive foundation for gender-responsive policy development across the Portuguese public administration.

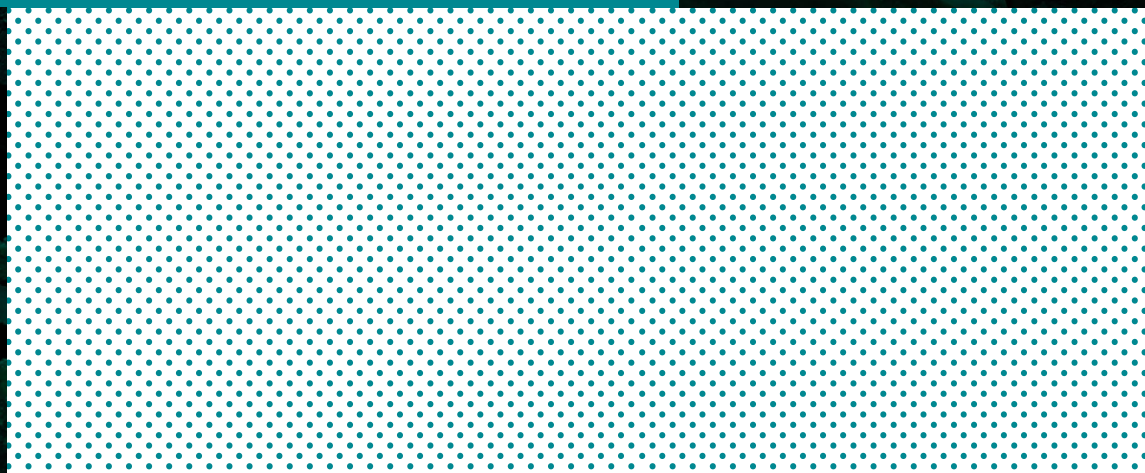
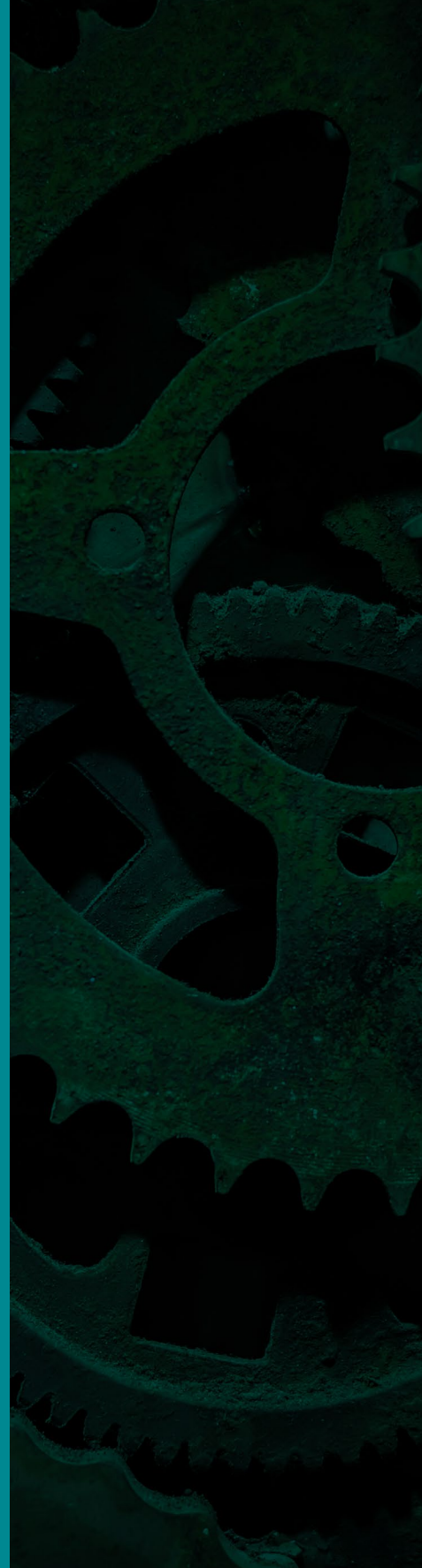


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Section 3

FUTURE
DIRECTIONS AND
RECOMMENDATIONS



Although major progress was made through the Gender Flagship Project, particularly in piloting tools and fostering institutional collaboration, the next phase should focus on consolidating these advances and addressing persistent structural gaps. A central priority is the establishment of a formal and shared governance mechanism to coordinate gender mainstreaming across sectors. This includes strengthening CIG’s technical and institutional capacity to lead intersectoral networks, while transforming existing partnerships—particularly with the Ministry of Finance and INE¹⁸—into structural axes for gender-responsive budgeting.



The goal is the process itself – gender-responsive budgeting and equality require sustained, everyday effort. The Gender Flagship Project provided not only technical tools but also the political space and legitimacy needed to keep gender equality on the agenda and move the conversation forward in Portugal.



Project beneficiary

To embed gender equality more effectively in public policymaking, it is also essential to enhance the production and use of sex-disaggregated data, especially in areas where statistical visibility remains limited. Further efforts are needed to simplify and operationalise gender impact assessment methodologies, making them accessible and applicable across diverse policy areas, including technically complex domains such as the environment, climate action, and digital transition.

At the same time, it is critical to promote and scale the practical use of the tools developed during the project, ensuring their dissemination, uptake, and replication across public institutions. This must be supported by the development of clear monitoring and impact indicators, along with periodic, results-oriented reporting that enables evidence-based policy adjustments.

Additionally, advancing the integration of gender criteria into public procurement remains a priority. The preparation of a national guidance document by CIG represents an important step toward addressing existing implementation challenges.


Taken together, these actions will help institutionalise gender equality as a structural dimension of public governance—anchored in formal cooperation frameworks, informed by robust data, and sustained through practical tools, continuous training, and policy accountability mechanisms.

Addressing some of these gaps will be the objective of Portugal, which will continue its participation in the TSI 2025 cycle.


¹⁸ Instituto Nacional de Estatística (INE)



Annex



ANNEX. SPOTLIGHT
PRACTICE:
ACTION PLAN FOR
STRENGTHENING
GENDER-RESPONSIVE
BUDGETING (GRB)



Purpose and added value

The Action Plan for Strengthening Gender-Responsive Budgeting (GRB) represents a major advancement in Portugal's commitment to integrating gender equality into its public financial management system. Developed in 2024 under the leadership of the Ministry of Finance and in coordination with the Commission for Citizenship and Gender Equality (CIG), the Plan lays out a detailed and structured roadmap for institutionalising GRB across the Portuguese public administration between 2025 and 2030.

The Plan was developed as a strategic response to specific implementation challenges identified with Portugal's existing GRB system. Since 2019, Portugal had been piloting gender-responsive budgeting through Annex IX-A, but this approach faced limitations including fragmentation between gender, climate, and SDG reporting; inconsistencies in how gender impacts were classified and reported; and insufficient capacity among budget coordinators to conduct meaningful gender analysis.

The Plan moves beyond earlier pilot-based approaches and aims to embed GRB as a consistent, system-wide practice through four interconnected objectives: (1) empowering public authorities to follow gender perspectives in State Budget interventions, (2) monitoring implementation of budget programs and measures, (3) creating gender-sensitive indicators for pilot budget programs, and (4) evaluating the process of incorporating gender perspectives into the State Budget. In doing so, it draws on Portugal's legal and strategic frameworks, including Decree-Law 10/2023, the National Strategy for Equality and Non-Discrimination (ENIND), the Portugal 2030 Strategy, and the Public Administration Innovation and Modernisation Strategy.

One of its most significant contributions is the structural innovation of integrating previously separate budget annexes (IX-A for gender equality, IX-B/IX-C for climate action) into a unified Annex XXI - "Gender Sensitive Budget, with dimensions of climate action and SDGs." This reform addresses fragmentation issues while positioning gender equality as the primary organising principle rather than subordinating it to other frameworks. Through this alignment, the Plan provides both strategic coherence and technical direction, enhancing consistency across sectors and reinforcing the relevance of GRB as a tool for inclusive governance.

Novelty

The Action Plan is the first national framework of its kind in Portugal specifically designed to institutionalise GRB across the entire budgetary cycle. Its novelty lies in both its structural design and the breadth of innovation it introduces to operationalise GRB in practice.

The Plan establishes a formal multi-institutional partnership model between CIG, DGO (Directorate-General for Budget), PlanAPP, and environmental secretariats, with regular joint working sessions and shared responsibility for implementation. This collaborative governance structure ensures sustained technical and political commitment while preventing the marginalisation of gender considerations within broader policy frameworks.

The Plan brings together four interrelated components of action: partnership and coordination mechanisms, comprehensive training and capacity building, monitoring and reporting systems, and evaluation frameworks. These components collectively support the integration of gender considerations from planning through to performance review, with specific timelines and measurable targets including 90% of organisations trained by 2030, creation of 10 gender-sensitive indicators, and annual monitoring reports.

A particularly innovative feature of the Plan is the strengthening of digital tools for data collection and monitoring. It envisages the use of harmonised templates, simplified reporting procedures, and gender-sensitive indicators across selected pilot programmes. Although automated reporting and real-time tracking are not fully established, the groundwork for enhanced digital integration is a core element of the strategy.

The Plan addresses methodological coherence challenges by ensuring consistent application of EU gender-responsive budgeting classification systems and developing unified reporting frameworks that prevent contradictory gender impact assessments. Unlike its predecessor, Annex IX-A, the new Annex XXI consolidates reporting on gender equality, climate action, and SDG implementation through a unified, outcomes-based model. The Plan proposes specific improvements to Annex XXI's structure, including moving gender equality fields to the beginning of the form, making all fields mandatory (even if scored "0"), and requiring each budget program to include at least one gender-sensitive measure or indicator.

To support these reforms, the Plan proposes comprehensive capacity-building infrastructure including development of training courses for budget program coordinators, preparation of support guides and manuals, creation of a professional network for gender-responsive budgeting practitioners, and establishment of regular seminars and technical meetings. The Plan also includes provisions for restoring gender-responsive budgeting language in future budget circulars and creating simplified instructions with fact sheets and glossaries.

The Plan's implementation is guided by a collaborative approach, with the Ministry of Finance and CIG jointly responsible for oversight. This dual leadership structure ensures that technical capacity and political commitment remain balanced and sustained throughout the implementation period.



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Implementation in practice

The Action Plan builds upon the lessons learned from Portugal's earlier GRB initiatives, notably the use of Annex IX-A as a budget reporting tool for gender-related measures. Although Annex IX-A succeeded in increasing visibility for gender equality in the budget, it was limited by inconsistencies in reporting and difficulties in evaluating outcomes. These limitations were key drivers for designing a more robust, integrated system.

The Plan thus played a central role in shaping the creation and practical application of Annex XXI, introduced in the 2025 budget cycle. Annex XXI now serves as a comprehensive reporting tool that brings together gender, climate, and SDG dimensions, reflecting a more holistic and outcomes-oriented approach. The Action Plan continues to guide the ongoing use, refinement, and institutional uptake of Annex XXI.

Implementation is further supported by the forthcoming 2026 Training and Monitoring Strategy, which seeks to strengthen the capacity of public officials to apply GRB principles consistently. The Plan also includes provisions for the development of technical resources, coordination mechanisms, and improvements in data systems to facilitate monitoring and reporting.

However, implementation has not been without challenges. Coordination among stakeholders remains fragmented, and key partners such as PlanAPP, INE, and INCoDe.2030 are not yet fully integrated into the process. In addition, the absence of binding reporting requirements weakens the enforceability of GRB practices. Perhaps most critically, the lack of a dedicated national budget line and the continued reliance on external funding sources pose significant risks to the sustainability of the Action Plan over the long term.



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Guidance for adaptation

Portugal's experience offers valuable insights for governments seeking to scale up from pilot GRB initiatives to full institutionalisation. One of the clearest success factors is the existence of a strong legal and policy foundation that frames gender equality as a cross-cutting priority. Equally important is the consistent involvement of senior political leadership and the structured collaboration between gender and finance institutions, which ensures both legitimacy and continuity.

The phased evolution from isolated budget annexes—such as Annex IX-A—to a fully integrated Action Plan and the launch of Annex XXI provides a replicable model. This process underscores the importance of sustained capacity-building, cross-sectoral coordination, and the simplification of reporting tools to enable broader institutional adoption.

In addition, the Portuguese model highlights the strategic advantage of linking GRB to national indicator frameworks. This allows GRB to extend its influence beyond traditional social sectors and embed itself across the entire public finance ecosystem.

While challenges remain, Portugal's Action Plan demonstrates that with the right mix of political commitment, technical innovation, and institutional cooperation, gender-responsive budgeting can become a permanent and effective instrument of fiscal governance.

Expertise France is the French interministerial agency in international cooperation and development, part of the French Development Agency (AFD) Group.



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