

Institutional Support Project for Customs Administration and Public Expenditure Management – ISP CAPEM

TERMS OF REFERENCE

Technical Assistance for Gender Mainstreaming/Gender-Responsive Budget preparation

I. General context

The Government of STP (Government) has launched a reform programme to address the challenges of economic governance, where it seeks to promote productive activities and increase opportunities for their expansion, attracting investment and simultaneously strengthening economic and financial governance. These reforms will support the creation of new jobs, as well as improve macroeconomic stability and the sustainability of public financial management (PFM) systems.

In 2019, a PFM assessment was carried out according to the PEFA (*Public Expenditure and Financial Responsibility*) methodology. This assessment identified a low level of capacity in public financial management and a very limited effectiveness of the reforms initiated since the last PEFA in 2013. Therefore, based on this diagnosis and other sectoral analyses, a public financial management reform strategy was developed for the period 2020-2023, through an Action Plan for the Reform of Public Financial Management (PARFIP II). Public Finance Management Reform Department (GARFIP) is responsible for coordinating the execution of the strategy and action plan. The Government has since developed a PFM Strategy and Action Plan (2025-2028) which is under implementation though not yet formally approved.

The Government is cognizant of existence of capacity gaps in key areas that limit the implementation of planned reforms, including domestic resource mobilization, public expenditure management and oversight, and has since requested support from the African Development Bank (AfDB) Group for strengthening some selected public finance management (PFM) related institutions. In this sense, the Institutional Support Project for Customs Administration and Public Expenditure Management (ISP-CAPEM) will focus on strengthening institutional capacities to improve expenditure management, customs administration and public expenditure management.

The government has ratified international and national legislation, including the African Union and SADC treaties, the United Nations Convention on the Elimination of All Forms of Discrimination

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against Women (CEDAW), and has adopted the Platform for Action and the Beijing Declarations on Gender Equality and the Promotion of Women and is committed to implementing the AU Declarations on Gender Equality and Women Empowerment.

The country has a National Strategy for Gender Equity and Equality (ENIEG III) and a framework to guide mainstreaming of gender into all sectors of national development. In July 2022, the National Assembly unanimously approved the parity law. However, the implementation of Gender Policy across different policies, instruments, and governance systems is highly challenged by a gender-neutral approach and no adequate monitoring systems to capture the gender equality public expenditure.

Through the ISP-CAPEM, the government seeks to improve women's economic empowerment by supporting a series of key measures, such as: (a) the development of guidelines on gender budgeting issued by the Ministry of Economy and Finance; (b) Integration of a gender code in the budget module to improve budget classification and allocation, with the aim of improving transparency on gender equity at all levels; (c) Dissemination of the GRB framework and guidelines tools in all ministries; and (d) Fair procurement systems will improve specific opportunities for women-owned businesses and collect sex-disaggregated data.

The Pro-PALOP-TL ISC project, a project to strengthen the technical and functional capacities of the supreme audit institutions of Portuguese-speaking African countries, carried out an in-depth analysis of the State budget with a focus on gender and a gender-responsive budgeting perspective, in São Tomé and Príncipe, through technical assistance, using the 2022 General State Budget proposal as a baseline. This technical assistance was the first step in familiarizing the process of integrating gender into planning and budgeting with autonomous ministries and services, where training and gender-sensitive budgeting actions were carried out, which triggered the inclusion of government's gender markers in the budget circular from 2023.

II. Objectives of the Assignment

The objective of the assignment is to support the government, through the Ministry of Economy and Finance and other sectors of the state administration, to build capacity and prepare a gender-responsive budget within the framework of the general state budget for 2025, based on the already existing gender

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markers. The project thus seeks to recruit an expert in Gender Responsive Budgeting (GRB), in order to achieve several crucial objectives for the GoSTP.

The Gender Expert to be recruited will:

1. Develop a GRB Guideline's Support to unify and simplify the key documents in the budgetary cycle formats, planning, forms, and programming.
2. Ensure the effective integration of gender issues at all stages of the country's budget cycle.
3. Conduct gender analysis of budget allocations and expenditures to ensure budget allocations address gender-specific needs. Critically analyze the current budget cycle, processes, policies to identify gender gaps and biases and propose tangible solutions to fully integrate a gender perspective.
4. Formulate, based on a detailed analysis of the budget cycle, specific recommendations, aligned with best practices in Gender-responsive budgeting (GRB).
5. Support training key government staff of relevant ministries on the GRB Methodology to ensure a comprehensive understanding and internalization of gender principles in their budgetary responsibilities.
6. Provide technical assistance to government agencies and stakeholders.

III. Working methodology/expert tasks

The recruited expert will play a crucial role in achieving the stated objectives and tasks. The main responsibilities for the Expert are detailed below:

1. Overall analysis of the budget process: Conduct an in-depth analysis of the entity's current budget cycle, identifying specific points where gender mainstreaming can be optimized. The Expert will assess existing fiscal policies, examining their impact on gender and proposing the necessary adjustments to promote equity.
2. Formulation of strategic recommendations: Based on the analysis, the Expert will make detailed policy recommendations to strengthen the inclusion of a gender perspective at all stages of the budget cycle. These recommendations will be prepared considering the specific reality of the entity, integrating innovative and sustainable approaches to effectively integrate gender issues.

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3. Development of guide for gender-responsive budgeting: The Expert develop a comprehensive practical guide, translating recommendations into concrete actions and adapting best practices in gender budgeting to the STP context. The guide will include clear steps, practical framework and tools and relevant case studies to enable entity members to successfully implement the GRB Guidelines.
4. Facilitation of workshops and trainings: The Expert will organize and facilitate specialized workshops and trainings for ministry/sector staff on gender-responsive budgeting, gender dissemination, monitoring and evaluation of public expenditure from a gender perspective, with the aim of sharing knowledge, clarifying doubts and ensuring a comprehensive understanding of GRB principles. The Expert will strengthen the skills of government staff on gender inclusion throughout the budget process.
5. The expert will support strengthening collaboration between three government institutions that are key on GRB implementation: Public Finance Management Reform Department (GARFIP), the Ministry of Justice, Parliamentary Affairs and Women's Right the Ministry of Economy and Finance (MEF).
6. Follow-up and Feedback: The Expert will establish intermediate steps for regular reviews and feedback, ensuring that the recommendations continually align with the goals of the GoSTP and that the proposed guide meets the practical needs of users.

IV. Profile Consultant

The consultant must meet the following technical requirements:

- a. **Education Qualification:** A minimum of a master's degree in Gender, Development Studies, Economics and related fields. A postgraduate certificate in public finance or related fields will be an added advantage.
- b. **Skills:**
 - i. The Expert must have a strong proven track record in areas related to gender-responsive budgeting, demonstrating a thorough understanding of the challenges and opportunities inherent in integrating gender issues into budgetary contexts.

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- ii. The Expert must have strong analytical and technical skills to review budget documents, identify areas of opportunity to effectively integrate gender issues, and propose equity-promoting adjustments.
- iii. The Expert must have proven skills in leading workshops and training, excellent communication and facilitation skills.
- iv. The ability to convey complex concepts in an accessible way, fostering understanding and engagement among the members of the entity, is fundamental.
- v. The Expert must have experience in Gender Analysis of the gender policies
- vi. Ability to work with diverse stakeholders, multisectorial coordination and collaboration.
- vii. The Expert must demonstrate a clear commitment to the promotion of gender equity, a thorough understanding of the principles of gender equality, women's empowerment, and the ability to advocate for positive changes at the budgetary level.
- viii. The Expert must have at least 7 (seven) years' experience in gender mainstreaming in public finance.
- ix. Experience and knowledge of the local context is an advantage.
- x. The Expert must have a complete command of the Portuguese language, both oral and written, to be able to interact with interested parties and write the expected reports and products.

V. Criteria for the selection of consultants

The Consultant will be selected in accordance with the African Development Bank's selection procedures, as specified in the Bank's Procurement Framework dated October 2015 and is open to all eligible bidders as defined in the procurement framework available on the website. Bank's website at <http://www.afdb.org>

The evaluation of recruitment will follow the criteria detailed below.

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CRITERION	WEIGHT
General Qualifications and Suitability for the Proposed Task: i. Academic qualifications (10) ii. Qualification relevant to the mission/task (10) iii. Number of Years of Qualification (5)	25
Work experience and relevant knowledge: i. Relevant experience of the consultant (20) in the specific area of GRB ii. Number of years of relevant experience as a consultant (15) on gender issues iii. Commitment to similar assignments/tasks and regional experience (15) iv. At least 7 (seven) years' experience in gender mainstreaming in public finance (10)	60
Fluency in Portuguese, spoken and written (15)	15
Total	100

Applicants should send a curriculum vitae (CV) and a brief expression of interest summarizing their understanding of ToR and how to approach the task.

VI. Expected results

The assignment will result in the delivery of several products, each designed to meet specific objectives and contribute to the successful implementation of GRB practices in São Tomé and Príncipe, as outlined below:

- a. **Inception Report:** Containing a comprehensive view of the proposed consultancy strategy and methodology, including training actions. The document includes a preliminary structure for the final report, outlining the main sections and a work plan with a detailed timeline.
- b. **Preliminary Report:** Presentation of a preliminary report with the findings of the initial report and policy recommendations. Includes an in-depth analysis of the current

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budget processes and policies, highlighting areas for improvement. The first policy recommendations propose adjustments to improve gender mainstreaming, as well as a timeline for implementing gender mainstreaming, at different budgetary times, instruments and processes. The preliminary draft of the practical guide was presented, highlighting the essential elements. It also incorporates preliminary comments from the procuring entity and other stakeholders, allowing for adjustments if necessary for the final phase.

- c. **Practical Guide for "GRS"**: A comprehensive practical guide for the implementation of "GRS" should be prepared, including practical steps, GRB framework and tools and relevant case studies to guide the members of the entity in the effective application of the principles of "GRS". This guide should make it possible to take gender issues into account in the State budget.
- d. **Awareness-raising materials**: development of awareness-raising and training materials, such as presentations, information leaflets, and other visual resources, to promote awareness and understanding of gender mainstreaming in budgeting.
- e. **Final report**: a comprehensive document consolidating all the activities, conclusions, recommendations and documents developed throughout the consultation. This report will serve as a reference resource for future initiatives related to gender equality. It should include the defined approach for this integration, and should be presented in a PowerPoint action, summarizing the main aspects of the consultancy, highlighting the benefits of implementing Results-Based Management (RBM) and the next steps for the beneficiary.

All reports and written communication must be delivered in Portuguese language. (with translation in English language).

VII. Working Partners

- Ministry of Economy and Finance (GARFIP, Budget Directorate);
- Ministry of Justice, Parliamentary Affairs and Women's Rights (National Institute for the Promotion and Equity of Gender -INPEG); and
- Public sector technicians.

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VIII. Duration

The expert's intervention will last 60 working days, spread over a time horizon of 5 months. The fieldwork component must represent at least 30 working days, spread over 2 field missions.

The consultation must begin within 15 days of signing the contract.