



Action Plan on Geographical Balance

PORTUGAL

2023

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1. Introduction

In line with the 2018 report on geographical balance¹, the new Human Resources strategy² **“Communication to the Commission: A new Human Resources Strategy for the Commission”**³ highlights the importance of geographical balance of all staff, which is to be strengthened, and foresees the development of Action Plans together with under-represented Member States. This Action Plan represents a joint political commitment by the Member State and the European Commission (Commission) to strengthen geographical balance and takes the form of measures to be undertaken by the Member State, by the Commission as well as joint measures.

As a rule, discrimination based on nationality is prohibited by the Treaties, the Charter of Fundamental Rights, and the Staff Regulations. At the same time, the EU Staff Regulations require that EU institutions recruit staff from the broadest possible geographical basis.⁴ In 2014, the co-legislators introduced a new legal basis (Article 27) for each institution to adopt appropriate measures where a significant imbalance between nationalities of Officials is observed and is not justified by objective criteria⁵. A balanced geographical representation among staff is also necessary for the Commission to meet one of its fundamental goals, i.e. to be close to the citizens and to reflect the diversity of Member States.⁶

The methodology for defining this objective has been the subject of several communications⁷ over time. It has taken the form of guiding rates or reference values, as well as indicative recruitment targets for enlargements.⁸ In its 2018 report on geographical balance⁹, which focuses on AD staff (Officials and Temporary Agents) occupying non-management functions and excludes linguists¹⁰, the Commission considers a significant imbalance is observed if the share of nationals of one or more Member States amongst staff is lower than 80% of the relevant guiding rate.¹¹ The Commission regularly reports on the state of play on presence by nationality among its staff. Measures have been adopted by EPSO and the Commission when imbalances were observed. However, these measures have not always provided results in line with the objective. Under-representation in some staff categories is still observed in several nationalities, including in the case of Portugal.

¹ [COM\(2018\)377final/2](#)

² [C\(2022\) 2229 final](#)

³ According to the Communication to the Commission: *A new Human Resources Strategy for the Commission*, [C\(2022\) 2229 final](#), ‘On geographical balance at all levels, though by law we need to recruit staff on the broadest possible geographical basis from among nationals of Member States of the Union, there are categories of staff for which certain Member States are currently under-represented. [...] In 2022, specific Action Plans will be developed together with these Member States to improve their balance, keeping in mind that by law, no posts should be reserved for nationals of any specific Member State.’.

⁴ See in that sense Article 27 of the Staff Regulations and Article 12 of the Conditions of Employment of Other Servants.

⁵ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:01962R0031-20230101&from=EN>

⁶ [COM\(2018\)377final/2](#)_10268/1/18 REV 1

⁷ Commission Communication of Mr Van Miert SEC(1994)844 of 17 May 1994 at the occasion of the accession of Austria, Finland and Sweden; Communication of Mr Kinnock concerning the recruitment of Commission Officials from the new Member States of 14 February 2003 C(2003)436/5, adopted on 19 February 2003; Communication of Mr Kallas C(2006)5778 concerning the recruitment of Commission Officials and Temporary Agents from Bulgaria and Romania of 24 November 2006, adopted by Written Procedure on 1 December 2006 (SEC(2006)1574/5); Communication of Vice-President Šeřčovič concerning the recruitment of Commission Officials and Temporary Agents from Croatia of 12 July 2012, (SEC(2012)436 final).

⁸ The indicative recruitment targets refer to nationals from Member States joining the EU on the occasion of enlargements.

⁹ [COM\(2018\)377final/2](#)

¹⁰ In the 2018 Report, when considering geographical imbalances of staff, staff includes Officials and Temporary Agents as they occupy the same type of posts in the Establishment Plan.

¹¹ In its 2018 report on geographical balance, the Commission considers a “significant imbalance” is observed if the share of nationals of one or more Member States amongst staff is lower than 80% of the relevant guiding rate and is focussing on AD staff occupying non-management functions excluding linguists.

More recently, the Commission committed in its HR Strategy that it will prepare specific Action Plans, together with the Member States concerned, to address this issue and take into account the specificities of each Member State.¹² In addition to the Action Plans, the HR Strategy indicates that, in line with Article 27 of the Staff Regulations, the Commission will consider adopting General Implementing Provisions to enable actions aiming at improving geographical balance.

1.1. Developments in 2022

In order to address the geographical imbalance of Portuguese nationals (both structurally and in the shorter term), the Director-General for HR, the Secretary of State for European Affairs of Portugal and the Permanent Representative of Portugal agreed, on 24 May 2022, to jointly prepare this Action Plan, based on the specific situation of Portugal. The aim of this Action Plan is to analyse Portugal's under-representation among Commission Staff including management, and to set out measures to be undertaken by Portugal, the Commission, EPSO, as well as measures to be undertaken jointly in order to address this issue.

The implementation of some of these measures has already commenced in 2022, others in 2023, and are ongoing as per measures included in this joint Action Plan and Portugal's National Strategy on EU Careers¹³. The assessment of the results will be undertaken in the first quarter of 2024.

However, in line with the Staff Regulations, all work to address geographical imbalances is to be done in the context of no posts reserved for nationals of a specific Member State, and merit remains the primary selection criterion.

2. Portugal: challenges and outlook

2.1. Geographical balance snapshot as of 31/12/2022

Portugal is below 80% of the guiding rate at the AD05-AD08 Officials' level (Figure 1) but is above 80% of its guiding rate when Temporary Agents are included. It is at 80% of the guiding rate in the category of all non-linguist administrators (including management; Figure 1). Portugal is below 100% of the guiding rate¹⁴ at Middle Management level and at 100% of the guiding rate at Senior Management level (Figure 1).

¹² According to the Communication to the Commission: *A new Human Resources Strategy for the Commission*, C(2022) 2229 final, 'On geographical balance at all levels, though by law we need to recruit staff on the broadest possible geographical basis from among nationals of Member States of the Union, there are categories of staff for which certain Member States are currently under-represented. [...] In 2022, specific Action Plans will be developed together with these Member States to improve their balance, keeping in mind that by law, no posts should be reserved for nationals of any specific Member State.'

¹³ <https://eurocid.mne.gov.pt/estrategia-nacional-para-carreiras-europeias>

¹⁴ According to the Report from the Commission to the European Parliament and the Council pursuant to Article 27 of the Staff Regulations of Officials and to Article 12 of the Conditions of Employment of Other Servants of the European Union (Geographical balance (COM(2018) 377 final/2), only the distribution of staff occupying non-management functions is considered. The report excluded management staff from its scope and the guiding rates defined for non-management staff are not therefore directly applicable. Indeed, the only relevant legal basis referring to geographical balance in management staff in the Commission, the Compilation Document on Senior Officials Policy (SEC(2004) 1352) only refers to functions of Director-General or equivalent (i.e. Deputy Director-General or Hors Classe Adviser) stating that the Commission considers it a desirable objective that each nationality should hold at least one function corresponding to the basic post of Director-General. Nonetheless, it is longstanding internal administrative practice to monitor the presence of Middle and Senior Management

Figure 2A shows that since 2016, the non-linguist AD staff (non-management), including Officials and Temporary Agents, has been on a stable level with an important share of Temporary Agents now well above the guiding rate. Figure 2B shows however that Portugal is below 80% for AD5 – AD8 (Officials only) and for all AD Officials (excluding Middle and Senior Management).

The trended presence of non-permanent positions is depicted in Figure 3. The same figure also shows that Portugal is above 80% of the guiding rate at the level of Temporary Agents and for Contract Agents FGIV. Participation by Portuguese nationals in EPSO AD competitions is above the expected percentage relative to its population. The pass rate in EPSO AD competitions is below average adding to Portuguese under-representation at AD5-AD8 Officials' level.

Detailed analysis:

According to the 2018 report, the Commission considers a significant imbalance is observed if the share of nationals of one or more Member States amongst staff is lower than 80% of the relevant guiding rate.¹⁵

For a guiding rate of **3,1%**, a significant imbalance¹⁶ is defined as below 80% of the guiding rate which for Portuguese nationals corresponds to **2,5%**.¹⁷ Therefore, Portuguese nationals are:

- Below 80% of the guiding rate among all Commission staff (2,4%) and at 80% of the guiding rate among AD non-linguists (including management) (2,5%). Regarding the population of ADs, 17,3% are Temporary Agents;
- Above 80% of the guiding rate for Officials and Temporary Agents AD5-AD8 non-linguists (2,7%), of which 40,0% are Temporary Agents;
- Below 80% of the guiding rate at AD9-AD14 level when excluding management (2,3%);
- Below 100% of the guiding rate at Middle Management level (2,2%) and at 100% of the guiding rate at Senior Management level (3,1%) although there is no Portuguese Director-General or Deputy Director-General currently.

staff by analogy to the levels defined in the different Communications in effect (see footnote 6). Since 2018, the guiding rates per Member State used for internal monitoring of the presence of Middle and Senior Management staff in the Commission are the percentages defined in the 2018 report, even if they are not directly applicable. Internal reporting is established by reference to 100% of the guiding rates.

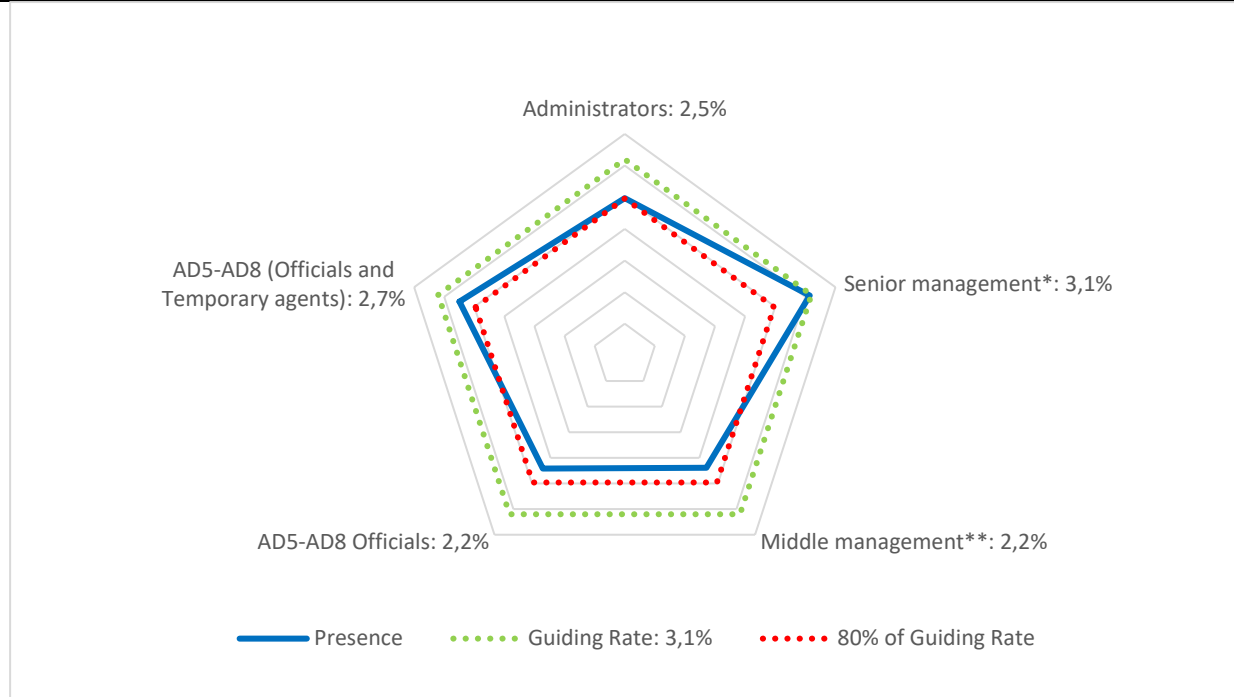
¹⁵ [COM\(2018\)377final/2](#)

¹⁶ In its 2018 report on geographical balance, the Commission considers a significant imbalance is observed if the share of nationals of one or more Member State amongst staff is lower than 80% of the relevant guiding rate and is focussing on AD staff occupying non-management functions excluding linguists.

¹⁷ This Action Plan concerns EU-27 nationalities and guiding rates without the UK from the Geographical Balance Report [COM\(2018\)377final/2](#). Managers that changed their first nationality from British to one of the EU-27 nationalities after 29/3/2017 are considered to have kept their British nationality in line with section 2, 1.2.2.1 of the Report.

Figure 1. Portuguese presence of permanent staff (including Temporary Agents) at the EC on December 31, 2022

In its 2018 report on geographical balance, the Commission considers a significant imbalance is observed if the share of nationals of one or more Member State amongst staff is lower than 80% of the relevant guiding rate and is focussing on AD staff occupying non-management functions excluding linguists.



* Includes Directors-General, Deputy Directors-General, Hors Classe Advisors, Directors and Principal Advisors. ** Includes Heads of Unit, Heads of Departments, Heads of Task Forces.

Figure 2.A. Portuguese trended presence of All AD (non-management), All AD5-AD8 (Officials + Temporary Agents), Temporary Agents as % of guiding rate

Staff count excluding Management, Linguists and UK nationals who changed nationality after the initiation of the Article 50 procedure.

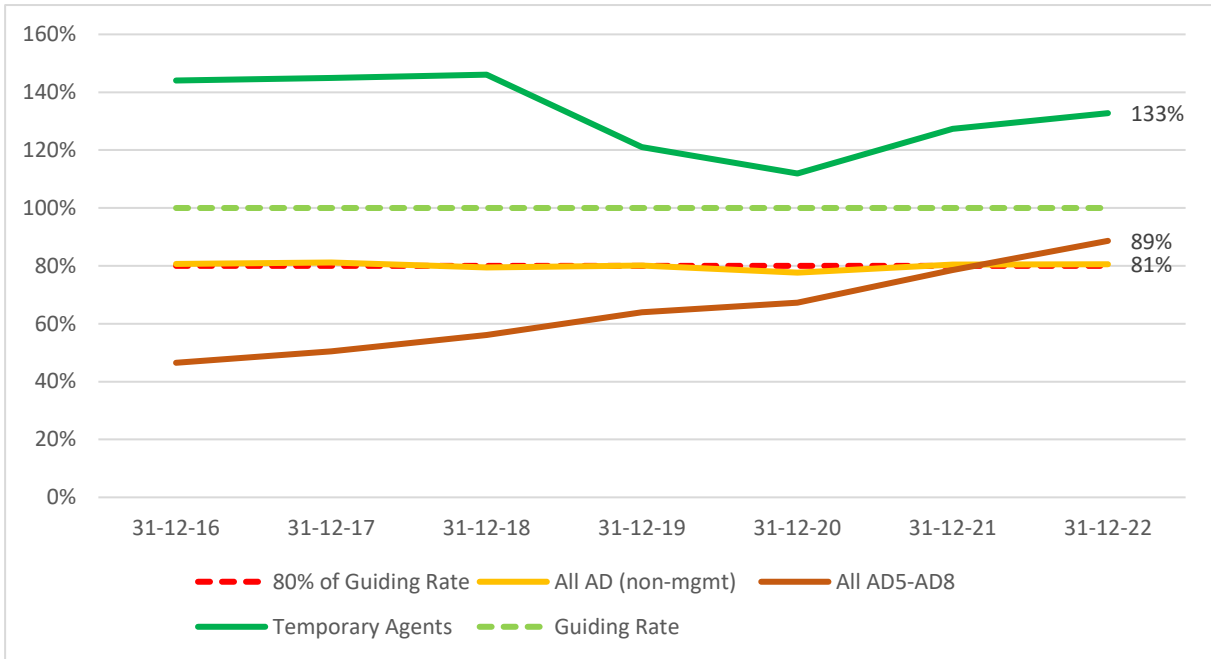
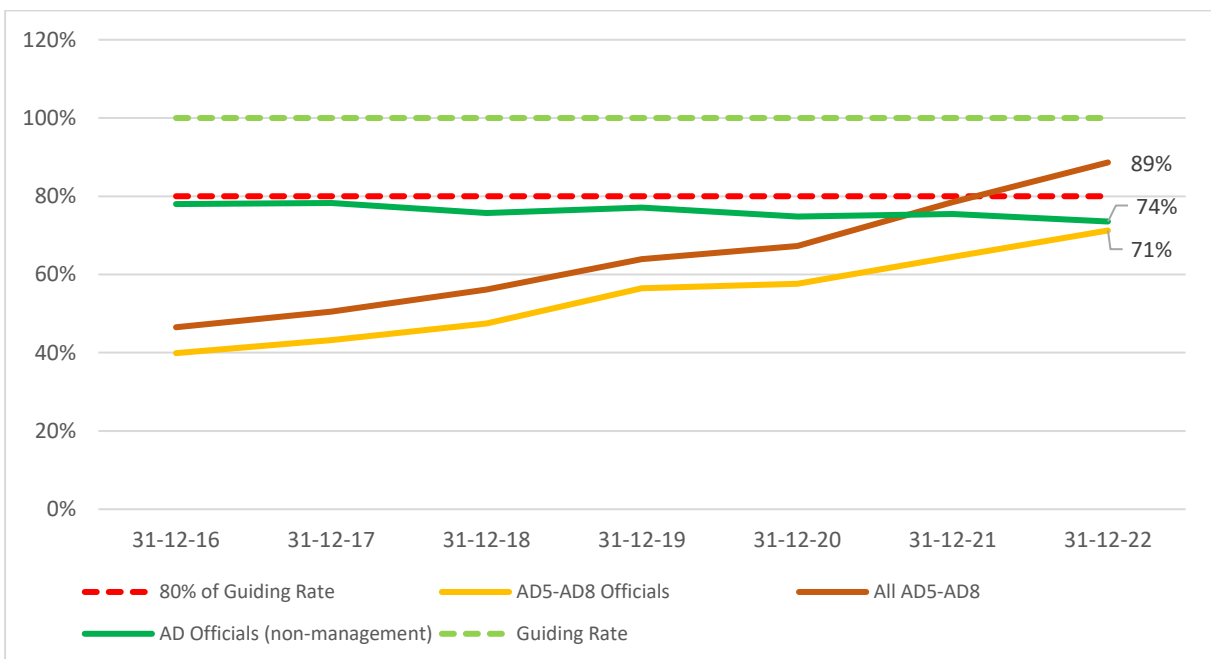


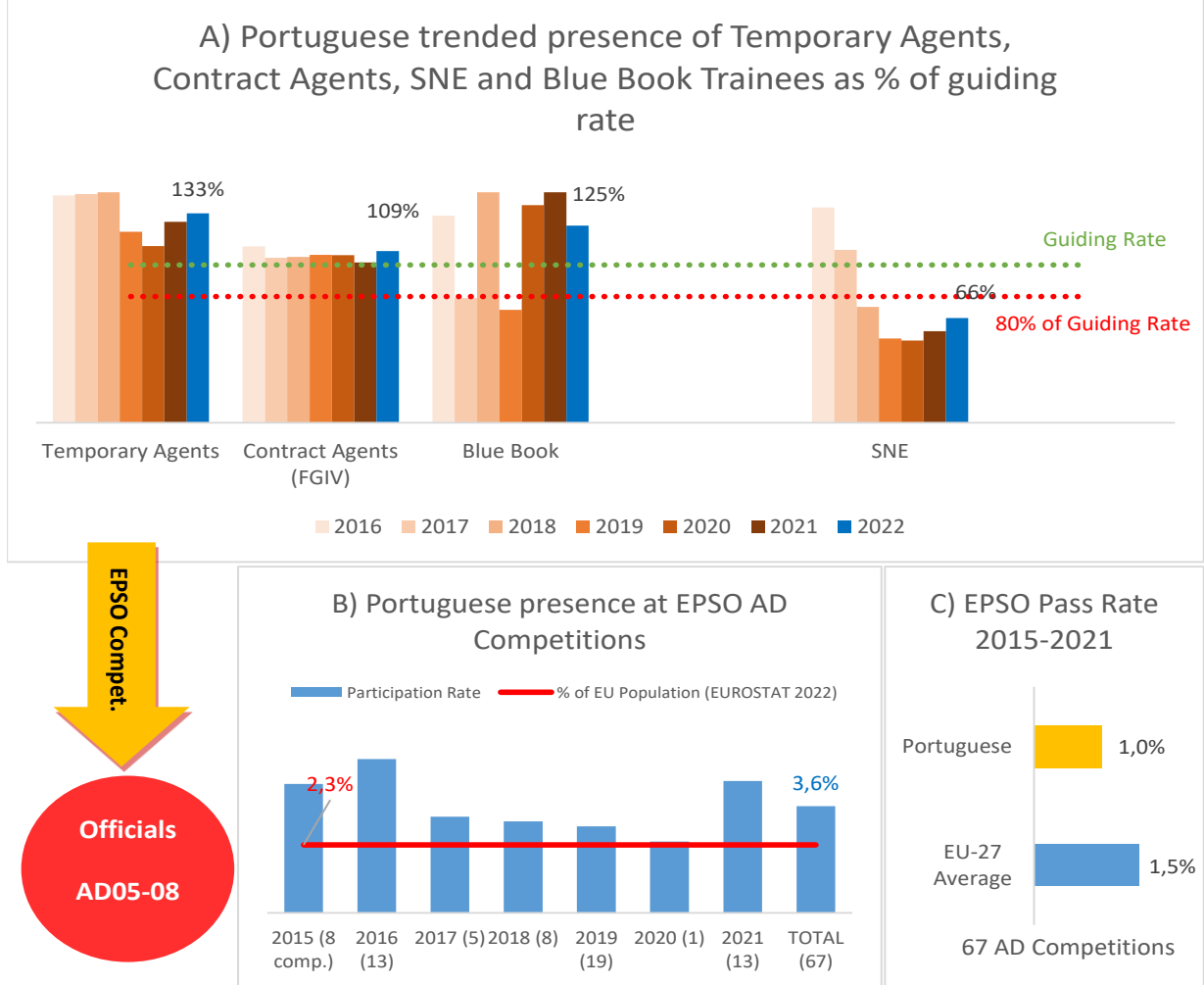
Figure 2.B. Trended presence of AD Officials (non-management), All AD5-AD8 (Officials + Temporary Agents), AD5-AD8 Officials (excluding Temporary Agents) as % of guiding rate for Portugal

Staff count excluding Management, Linguists and UK nationals who changed nationality after the initiation of the Article 50 procedure.



Data as of 31 December		2016	2017	2018	2019	2020	2021	2022
AD5-AD8 Officials	Staff	49	51	56	66	65	71	75
	Share %	1,2%	1,3%	1,5%	1,7%	1,8%	2,0%	2,2%
All AD5-AD8 (Off + TA)	Staff	61	64	73	85	90	108	125
	Share %	1,4%	1,6%	1,7%	2,0%	2,1%	2,4%	2,7%
AD Officials (non-mgmt)	Staff	225	226	222	230	225	226	219
	Share %	2,4%	2,4%	2,3%	2,4%	2,3%	2,3%	2,3%

Figure 3. Factors influencing Portuguese presence at the EC



A) Non-permanent staff of Portuguese nationality is, apart from SNEs, above the guiding rate in 2022. Together with external candidates, they have access to EPSO (external) competitions that could lead to permanent positions (Officials AD5-AD8). In addition, Temporary Agents and Contract Agents are eligible to apply for internal competitions. The Junior Professionals Programme is open to Blue Book Trainees, Contract Agents and Temporary Agents and since 2018 four Portuguese nationals have been selected for the JPP programme. Seconded National Experts (SNEs) do not fall within the parameters of the Staff Regulations, but the Commission takes them into account here, as an indication of the overall presence from Portugal in the Commission.¹⁸

B) Participation in EPSO AD competitions of Portuguese candidates initiated between 2015 and 2021 is above the expected rate based on the size of the population.

C) The pass rate of EPSO AD competitions initiated between 2015 and 2021 is below the EU-27 average.¹⁹ The results from measures targeting EPSO competitions will depend on the frequency of these competitions.

¹⁸ Across the Commission, 74% of SNEs are funded jointly by the Commission and the Member State (so called, “shared cost” SNEs) whereas 26% are paid in full by the Member State (“cost-free” SNEs).

¹⁹ The indicated EPSO AD participation- and success rate refers to an aggregated average of all AD competitions initiated between 2015-2021.

2.2. Outlook

Finally, the picture should also be interpreted in light of the following additional elements:

- A significant share of Portuguese Officials (21% of current AD staff of Portuguese nationality compared to 12% for EU-27 average) is set to retire from the Commission (“cliff edge” effect) between 2023 and 2026, including at managerial levels. If the recruitments do not compensate for departures, Portugal’s under-representation is likely to further increase. The Commission will therefore follow carefully the inflow and outflow trends²⁰;
- The lengthy and complex EU selection procedures and having to move from home lead to a lower appeal of EU careers for Portuguese nationals²¹. Additionally, differences between EPSO competitions and those organized at the national administration and universities mean that Portuguese candidates are not accustomed to the former type of exams. The Commission is addressing this problem, following the adoption of the new EPSO Competition framework at the end of January 2023, which is aimed at shortening and simplifying these EU selection procedures.

3. Measures to address under-representation

3.1. Portugal’s actions and initiatives

3.1.1. Ongoing measures (updated by Portugal)

For many years now, the Jacques Delors Information Centre (JDEIC/MFA) has been promoting EU careers all over the country, in a first moment (2012) as a part of a project to encourage international careers and later (since 2019) as an independent project.

Presently, the Centre uses a wide range of tools to reach and encourage Portuguese citizens (particularly university students and professionals) to apply for jobs and traineeships in the EU’s Institutions, Bodies and Agencies.

The available instruments are:

- Dedicated webpage on the Internet (included in the JDEIC’s Eurocid Portal²²) where new opportunities are published on a daily basis;
- Social Media – the Centre is present in the main social networks, such as Facebook, Instagram and LinkedIn, where these opportunities are regularly advertised. In 2019, a specific “show case” was created in LinkedIn where posts are done on a daily basis;
- Selective Dissemination of Information via e-mail – publicizing particular posts and competitions to a list of selected interested people and multipliers, such as Universities and Professional Associations;
- Information sessions (in presence or online) to specific publics across the country;

²⁰ Portuguese presence at Middle Management level has significantly reduced since 2016.

²¹ EPSO Final Report, ‘Analysis of a survey to improve information and communication activities for EU citizens interested in pursuing an EU career’ (2020). P.30.

²² [Empregos e Estágios | Eurocid - Informação europeia ao cidadão \(mne.gov.pt\)](https://mne.gov.pt/empregos-e-estagios)

- Participation in events such as JobShops and Career Fairs;
- Interviews in regional radio networks;
- Help-desk -available by e-mail and telephone.

A table containing data regarding all the above activities in the period between 1st January and 31st December 2022 can be found in **Annex 2** to this Plan.

Portugal also has, for many decades, been offering scholarships to Portuguese students at the College of Europe.

On the 30th November 2022, Portugal had adopted, at Council of Ministers level, a National Strategy for European Careers, which was published in the Portuguese Official Journal on the 23rd December 2022 and encompasses **5 fields of action**:

- a. Outreach and communication on EU careers – as a continuation and reinforcement of all that has been done in this field in the last years with positive results;
- b. Creation of a National Training Centre to support the Portuguese candidates to EPSO competitions and internal competitions;
- c. Reinforcement of the networking activities between the Portuguese staff in the institutions (permanent, Temporary and Contract agents, trainees, people who have retired) to foster ties and relations useful in terms of information sharing, orientation, support, coaching;
- d. Facilitation of the secondment of Portuguese national experts with the adoption of a specific budget for this purpose and approval of the SNE’s statute;
- e. Increase of the amount of national scholarships for students to attend the most well known schools of European studies (e.g. College of Europe).

Portugal’s national budget for 2023 foresees over 1 million euros to implement this strategy (in particular for the creation of the National Training Centre, scholarships and secondment of national experts). Additionally, in order to strengthen the capacity to implement some of the measures of the National Strategy, Portugal has submitted a request for technical assistance to DG Reform under the TSI program (Technical Support Instrument).

The measures foreseen in this Action Plan will be complementary to the implementation of the National Strategy for European Careers, which is ongoing.

3.2. European Commission’s measures

To strengthen geographical balance, the Commission will adopt measures considering the specificities of Portugal.

3.2.1. Actions aiming at redressing the observed imbalances in the short term, with impact on long term

In the short-term, actions aiming at improving geographical balance will mainly consist of promoting under-represented nationals in the recruitment of non-permanent staff as statistics show that a significant part of successful candidates in internal and external competitions belong to non-permanent categories.

As concerns the actions focussing on non-permanent non-linguistic AD level recruitments (which are valid both for the short and the longer term):

- DG HR launched in September 2022 a pilot project aiming to increase the share of Temporary Agents (TA) from under-represented Member States. DG HR is currently working with DGs to increase the visibility of job vacancies, possibly yielding more applications from these Member States. The take-up of this initiative is continuously assessed in order to improve the process also in view of new IT solutions to handle large number of applicants. Commission DGs are asked to **interview at least one candidate** from under-represented Member States when organising the selection of non-permanent staff as of September 2022;
- These actions are expected to produce a short-term effect and longer-term effect, e.g. by organizing internal competitions, allowing the most successful non-permanent staff to be recruited as Officials. In this sense, the Commission ensures a greater predictability for this internal track by publishing a calendar for internal competitions until 2024 (Annex 3);
- In parallel, DG HR is preparing **General Implementing Provisions** (GIPs), which will allow the adoption of appropriate measures to tackle geographical imbalances (including competitions by nationality) if required. The HR Strategy indicates that nationality-based open competitions will be used where appropriate and in line with EU law, following an analysis of the impact of Action Plans for underrepresented Member States. Whilst nationality-based open competitions are mentioned as possible appropriate measures under certain circumstances²³, it needs to be ensured that they comply with Article 27 of the Staff Regulations;
- The **Blue Book Traineeships** are also a key entry point in the Commission. DG HR and DG EAC (Education and Culture) agreed to apply as of 2023 the Member States' **guiding rates** and replace the current geographical quotas to improve the geographical balance of the Virtual Blue Book candidate-trainees. All trainees already receive introductory training for EU Careers in general, and positions as Contract Agents, AD5 and Junior Professionals Programme (JPP) in particular. For the October 2022 campaign, a top-up approach was used to improve the geographical balance of under-represented Member States and brought already positive results;
- The Commission is currently reviewing its decision on the use of Temporary Staff (to be adopted before the end of 2023), aiming for external publication of these posts to increase visibility (centralisation of publications on one webpage, together with the possibility to publish on other platforms). Commission Decision of 13.12.2022 established the **Juniors Professionals Programme**. The Commission will share regular data on the number of applications.

3.2.2. Actions aiming at correcting the underlying causes of imbalances in the longer term.

Actions aiming at correcting the causes of imbalances in the long term have a large spectrum. They include among others communication, outreach, and targeted training.

- **External competitions:** The main measures in the EPSO Action Plan include:

²³ Those appropriate measures must be justified and shall never result in recruitment criteria other than those based on merit. Before such appropriate measures are adopted, the appointing authority of the institution concerned shall adopt general provisions for giving effect to this paragraph in accordance with Article 110.

- a new competition model (approved) focusing on reducing the duration of external competitions to 6 months, from publication of the notices of competition to publication of the reserve lists;
- terminating the use of the Assessment Centre (oral tests) and using only written tests in the selection procedures;
- creating a single-window review mechanism;
- pre-publishing information materials for the EU knowledge test (used only for generalist AD and AST competitions);
- possibly introducing a digital skills test for some competitions, in line with the needs of EPSO's institutional clients;
- universal use of remotely proctored tests;
- reasoning tests organised on a pass/fail basis (not ranked);
- multilingual competitions with some testing in one specific language, in line with the needs of EPSO's institutional clients.

Moreover, EPSO will continue to publish information on competitions in due time, and will strive to enhance communication with successful candidates on its reserve lists. EPSO will also continue to provide targeted information on working and living conditions in Brussels and Luxembourg, including statistics and video staff testimonials.

EPSO will continue to produce webinars for Member States EU Careers experts, public video tutorials, public online landing pages and infographics (in all 24 languages), as well as social media posts and ads for each competition. EPSO's new website (June 2022) will remain the main information hub for external competitions.

- **Outreach:** The Commission will actively mobilise available resources in the Commission's Representations in capitals to participate in outreach, public events and spread targeted communications materials emphasising the opportunities of the EU careers offer (value-based jobs, variety of policy fields, possibility to be hosted in other Member States or in third countries outside EU, etc). In 2022 several EU careers workshops were organised by the Commission Representation in Portugal on the occasion of the Erasmus Generation Meeting in Porto, the Representations' SummerCEmp, the Conferences of Estoril and a major conference at the University of Lisbon. The Representation is also mobilising its multiple networks to participate in its outreach events, including EU Careers Staff Ambassadors. The Representation works in close cooperation with the EU Careers PT Ambassadors promoting the annual digital initiative «Blue Book IG Talks», in which Blue Book Alumni are invited to share their working experience at the EC during an Instagram Live.
- **Management:** The Commission will continue to work on identification of talent for managerial functions and support those Officials who aspire to Middle Management and Senior Management, also targeting Officials coming from under-represented Member States. This includes tailored development programmes for aspiring Middle Managers (in the form of different learning experiences that include coaching, mentoring, and career guidance) and Senior Managers (in the form of individual coaching sessions), and other support measures.

3.3. Joint measures

Actions to be jointly undertaken by the Portuguese Government, the Commission and its Representation in Portugal. These initiatives include among others targeted training, outreach and promotion.

- Portugal aims to build-up its National Training Centre capacity, and will explore different instruments to achieve this goal, including the possibility of implementing a technical assistance project presented by Portugal to DG REFORM under the 'Technical Support Instrument', if approved;
- EPSO will continue to ensure regular and adequate communication on the EPSO new competition model in order to better inform and train the national candidates. This will continue to be done via social media, and the EPSO website. Portugal will also communicate to candidates the new model through its social media and other communication channels;
- Portugal will develop its outreach and information on the Blue Book Traineeship Programme, especially on the new model of selection, thus ensuring its appropriate participation in the programme. In this regard, DG HR will provide the necessary assistance and cooperation. The mobilisation and appropriate information/training of Student Careers Ambassadors to this purpose will be instrumental;
- The Commission Representation in Portugal will organise EU Careers webinars bringing together EPSO, the Commission and a member of the Cabinet of the Secretary of State for European Affairs and/or the Portuguese Ministry of Foreign Affairs (MFA) to provide information about possibilities of careers in the EU and support Portuguese authorities;
- The Commission Representation will organise with Europe Direct Centres and European Documentation Centres seminars to raise awareness on EU careers and organise together events targeting young people throughout the country;
- The Commission and Portugal will work together to ensure that the information on the Junior Professional Programme is widely shared. The Commission will ensure the timely communication of the calendar, application procedure and selection procedure;
- Portugal and the Commission to further develop synergies between national careers promotion and outreach activities and the EU programmes "Back to School/Back to University". This will be done through the digital communication initiatives of the Commission Representation in Portugal, through the Staff Ambassadors and Student Ambassadors with Portugal advising on the areas, schools and universities, as well as continued ongoing communication and cooperation between Portugal, EPSO and the Commission;
- In cooperation with the Commission Representation in Lisbon, a pool of former EU Portuguese Officials could be established and developed, to cooperate with the national authorities in the organisation of mentoring activities for national candidates and young Officials;
- EPSO, in cooperation with the EU Careers' Staff Ambassadors and DG Communications, will continue its efforts to produce inspiring video testimonials of Portuguese nationals working for the Commission, in the Portuguese language. Portuguese relevant authorities will also assist EPSO to identify suitable Commission staff for such video testimonials, if needed;

- The Commission commits to regularly share information with Portugal regarding updates on recruitment procedures. The Commission further aims to share the information material (infographics, publications etc.) so its Representation in Lisbon and the Portuguese authorities can disseminate this information. The existing open line of communication will be kept between the Commission and Portugal;
- Finally, it is also important to do everything to reach potential candidates who have not traditionally seen a career for themselves in the EU institutions. This could include qualified candidates from lower socioeconomic backgrounds, from outside the main universities and centres of population, candidates with disabilities or with an ethnic minority background. These groups are currently underrepresented among Commission staff and reaching out to them could be a way of both increasing the talent pool and increasing diversity among Commission staff. This will be achieved by Portugal as part of the implementation of their National Strategy for European careers, and by the Commission in the implementation of its diversity and inclusion plan.

4. Data and performance indicators

4.1. Data sharing on geographical balance

The Commission is conscious that Member States need to be regularly informed on the evolution of the situation regarding geographical balance. The 2018 report on geographical balance was a one-off exercise (as foreseen by the Staff Regulations). The Commission committed, however, to present **data on geographical balance to the Working Party on Staff Regulations (WPSR) once a year** (higher frequency would not be appropriate for several reasons: statistical significance; influence of external constraints; technical factors; granularity is to be examined also in light of personal data protection. Additional ad hoc requests could be examined on a case-to-case basis).

In addition, the Commission will continue to provide **comprehensive statistics at regular intervals** through different channels: via the Europa website (HR statistics and Statistical Bulletin); three times a year directly to Permanent Representations (full staff listings); via regular updates to the WPSR on geographical balance.

4.2. Action Plan performance indicators

The measures implemented by Portugal and the Commission will be assessed in the first quarter of 2024 according to the following indicators (non-exhaustive list). The baseline used will be 31 December 2021.

Output indicators (they relate to implemented operations/measures by measuring what is directly produced/supplied):

- Indicators related to promotional and communication activities to be developed based on the design/setup of the measure and internal capacities to collect the data:
 - The number of participants at webinars or career fairs to promote specific EU jobs as well as EU careers, including at EPSO outreach events;

- Dedicated website on EU careers, targeted information campaigns including via social media (by Portugal, Commission and EPSO) and mailing lists (by Portugal and Commission);
- The number of followers on social media platforms;
- The number of candidates from Portugal who attend training and coaching sessions for EPSO competitions;
- The number of Portuguese nationals who receive support by email or phone via the helpdesk;
- The number of Portuguese Officials who attend training and coaching session for management positions;
- The number of networking events organized and the number of attendees, such as for Portuguese professionals already working in the EU Institutions and Blue Book Trainees;
- The number of Portuguese students receiving scholarships to attend the College of Europe;
- Number of EU Careers Staff Ambassadors;
- Number of EU Careers Student Ambassadors.

Result indicators *(they capture the expected effects on participants or entities brought about by an operation/measure):*

- Number of Portuguese applicants for the Blue Book Traineeship, and number of Trainees who start the traineeship;
- Number of Blue Book Trainees who become Commission staff;
- Number of successful Portuguese candidates in the Junior Professionals Programme (JPP);
- Share of Temporary Agents and FGIV Contract Agents;
- Number of non-permanent staff and number of external candidates who become Contract Agents FGIV, AD5-AD8 Temporary Agents or AD5-AD8 Officials;
- Share of administrators across various grades focusing on AD5-AD8 Officials;
- Participation and success rate at EPSO competitions;
- Number of SNEs;
- Number of SNEs becoming Contract Agents FGIV, AD5-AD8 Temporary Agents or AD5-AD8 Officials.

5. Next steps



As per the HR Strategy, the Commission, committed to improve geographical balance by meeting all Member States and drafting joint Action Plans for those that are under-represented in entry grade categories of staff. These Action Plans are not to be seen as “a one-off reporting” but rather as a continuous, dynamic process made jointly by the Commission and the concerned Member States, including Portugal.

The implementation of the soft measures in the joint Action Plans will be carried out during 2023. Based on the collected data on output and results indicators, the Commission will jointly with the Member States (in this instance, Portugal) make an assessment of the impact of these measures during the first quarter of 2024.²⁴

Based on the jointly reached conclusions from the assessment, it will be discussed whether to include further measures in addition to those already listed in this joint Action Plan. In addition, an annual follow-up of the statistics in the Working Party on Staff Regulations is foreseen as well as regular monitoring of geographical balance and continuation of a dialogue with Portugal.

The Commission encourages Member States to share their best practices. Synergies can be achieved by launching joint actions in Brussels, including the joint job fairs, and organizing communication and outreach events to promote EU Careers in which the Commission and other EU Institutions could participate.

²⁴ The assessment will be based on measures starting from the 1st of January 2022.

6. Annex 1: Glossary on Staff Grades and Categories

Administrator: This percentage includes staff between AD5-AD16. It includes managers and Temporary Agents. It excludes linguists.

AD5-AD8 Officials: This percentage includes AD5-AD8 Officials. It excludes linguists and Temporary Agents.

All Commission staff: This percentages includes all ADs, ASTs and AST-SCs in the Commission. It includes linguists and Temporary Agents.

Average EPSO Pass Rate: This percentage shows the country's EPSO AD Competition pass rate in comparison to the average EU-27 pass rate (1,5%) for competitions initiated between 2015 and 2021.

Bluebook Trainees (BBT): Twice a year, the Commission offers 5-month paid traineeships. The traineeships begin in March or October. This percentage includes both sessions per year.

Contract Agents (CA): Contract staff are employed for a limited period, with an initial contract of 6-12 months which can be renewed for up to 6 years. This percentage only includes Contract Agents FGIV.

Guiding Rate: It is used to measure and determine whether an EU Member State is underrepresented or not according to Article 27 of the EU Staff Regulations. It is calculated on the basis of: 1) population 2) number of seats in the European Parliament and 3) voting rules in the Council. A country is considered to be under-represented if there is a deviation of at least -20% from the guiding rate. It does not set indicative targets for future recruitments of certain nationalities and is used for monitoring purposes.

Junior Professional Programme (JPP): This percentage includes selected Junior Professionals (up to 50 in total per year). The JPP is targeted at Blue Book Trainees, CAST Contract Agents and Temporary Agents with less than 3 years of work experience. It gives them the opportunity to participate in internal competitions to become EU Officials at the end of the programme.

Middle Management: This percentage includes Heads of Unit, Heads of Departments and Heads of Task Forces.

Participation at EPSO Competition: The participation rate shows the country's share of participation in EPSO AD competitions initiated between 2015 and 2021 compared to the share of its population among the EU-27.

Permanent Staff: Permanent staff includes Officials and Temporary Agents as they occupy the same type of posts in the Establishment Plan.

Seconded National Experts (SNE): This percentage includes national or international civil servants who are working temporarily for the Commission but remain in the service of their national employer.

Senior Management: This percentage includes Directors-General, Deputy Directors-General, Hors Classe Advisors, Directors and Principal Advisors.

Temporary Agents (TA): Temporary Agents can perform specific tasks as an Administrator on a temporary basis. The maximum duration of the initial contract is four years. The contract can be renewed once for a maximum duration of two years.

7. Annex 2: Table of Portugal's Outreach Activities (2022)

Portugal's outreach activities			
01 of January to 31 of December 2022			
1 - Online publications (Eurocid Portal)			
	Number of publications	Visualizations	
Employment opportunities	434	429.168	
Traineeship opportunities	435		
2 - Dissemination of Information by e-mail			
	Number of disseminations	Number of e-mails sent	
	20	62.569	
3 - Dissemination on Social Media			
	Number of posts+stories	Impressions	Outreach
Facebook	102		268.244
Instagram	63		15.129
Linkedin (showcase Employment & Traineeships)	241	836.323	
4 - Information Sessions (online and live), Radio Interviews, Participation in events			
	Number	Participants	
Live sessions	10	709	
Online sessions	30	1.343	
Radio Interviews	4	(not available)	
Participation in events	4	128	
5 - Help-desk (e-mail and phone)			
	Number of replied e-mails	Phone - operating hours	
	220	7 hours a day, 5 days a week	

8. Annex 3: Calendar of Internal Competitions until 2024 (this may be subject to updates)

