

**TSI PROJECT 24PT29**

**STRENGTHENING POLICY COSTING METHODOLOGIES AND MEDIUM-TERM  
BUDGETING PRACTICES IN PORTUGAL**

**Workshop  
February 11-13, 2025**

**Lisbon, Portugal**

***Draft Agenda***

Tuesday 11 February 2025	
9:30 -10:00	<p><b>Opening call</b></p> <ul style="list-style-type: none"> <li>Welcome remarks</li> </ul> <p><i>MOF/GPEARI: TBD</i></p> <ul style="list-style-type: none"> <li>Presentation of the objectives of the workshop</li> </ul> <p><i>Delphine Moretti, Senior Policy Analyst, Team Lead, Public Financial Management and Reporting, OECD</i></p> <ul style="list-style-type: none"> <li>Introduction of speakers and participants</li> </ul>
10:00-11:00	<p><b>Medium-Term Budgeting in OECD Countries</b></p> <p><i>Delphine Moretti, Senior Policy Analyst, Team Lead, Public Financial Management and Reporting, OECD; and Dirk Kraan, OECD Consultant</i></p> <p>This session will examine the main concepts and tools of medium-term budgeting and explain OECD countries' practices, with insights from the 2023 OECD Survey and OECD Spending better framework. It will explore common challenges to fully leverage these budgeting tools and present good practices, as well as explaining why medium-term budgeting frameworks will become increasingly important in European Union Member States' public financial management (PFM) systems following the adoption of the new Economic Surveillance framework. It will be followed by a Q&amp;A.</p>
11:00-11:30	Break
11:30-12:30	<p><b>Medium-Term Budgeting in Portugal</b></p> <p><i>Delphine Moretti, Senior Policy Analyst, Team Lead, Public Financial Management and Reporting, OECD</i></p> <p>This session will examine the features of Portugal's current medium-term budgeting framework based on previous OECD assessments and the mini survey of line ministries, exploring both strengths and challenges in areas like policy costings, expenditure ceilings, baseline projections, and co-ordination between central and line ministries. It will be followed by a Q&amp;A.</p>
12:30-14:00	Lunch
14:00-15:00	<p><b>Multi-year Expenditure Baselines</b></p> <p><i>Dirk Kraan, OECD Consultant</i></p> <p>This session will first examine the role of multi-year expenditure baselines - defined as estimates of future spending assuming unchanged policies - in effective budget preparation and fiscal management. The session will explore how baselines serve as an instrument for understanding spending pressures, framing budget negotiations, and assessing fiscal space. This session will detail practical approaches and methodologies for updating baselines across different types of expenditure, including those that are particularly challenging such as health expenditures, and discuss OECD countries' experiences, including approaches adopted depending on IT constraints, resources, levels of institutional capacity. It will be followed by a Q&amp;A.</p>

15:00-16:00	<p><b>Existing policy costing</b></p> <p><i>Dirk Kraan, OECD Consultant</i></p> <p>This session will examine how to effectively cost existing policies within a programme budgeting framework, where expenditures are organized around policy objectives and measurable outcomes rather than traditional input-based classifications. It will explore practical approaches to costing existing government policies and programmes with references to international experiences and considering constraints from IT systems, available resources, etc. It will be followed by a Q&amp;A.</p>
<b>Wednesday 12 February 2025</b>	
9:30-10:00	<p><b>Opening</b></p> <p>This session will include a quiz on the previous day's presentations and offer an opportunity for follow up questions.</p>
10:00-11:00	<p><b>Methodologies for new policy costing</b></p> <p><i>Johann Seiwald, OECD Consultant</i></p> <p>This session will examine how governments can effectively develop and implement rigorous policy costing methodologies. The session will explore fundamental principles and international good practices for systematic policy costing, including establishing clear roles and responsibilities, designing appropriate processes and timelines, selecting robust methodologies, and ensuring transparency. It will be followed by a Q&amp;A.</p>
11:00-11:30	Break
11:30-12:30	<p><b>Practical examples for policy costing</b></p> <p><i>Johann Seiwald, OECD Consultant</i></p> <p>The second part will feature practical examples of how different countries have successfully approached costing across various policy domains, from social programmes to infrastructure investment. It will be followed by a Q&amp;A.</p>
12:30-14:00	Lunch
14:00-16:00	<p><b>Line ministry(ies) presentation (TBC)</b></p> <p>This session will feature presentations from selected line ministries on their current processes.</p>

<b>Thursday 13 February 2025</b>	
9:30 -11:30	<p><b>Manuals for Portugal</b></p> <p><i>Delphine Moretti, Dirk Kraan and Johann Seiwald</i></p> <p>This session will focus on identifying preferred approaches for the development of future manuals on: i) expenditure baselines, ii) costing of new policies, and iii) costing of existing policies.</p> <p>Building on discussions and insights from previous sessions, the OECD will present favored outlines and contents, and participants will be asked to deliberate on priorities, methodologies, and next steps for creating these manuals.</p>
11:30-12:00	<b>Closing of Workshop and Next Steps</b>