

PORTUGAL

TOWARDS A SYSTEMIC APPROACH TO SOCIAL PROTECTION

POVERTY WATCH 2024





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Poverty Watch

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Cover photo: School Against Poverty initiative for 4th graders at Sacapeito Elementary School in Santarém, 2024

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Introduction

Poverty Watch 2023 made it possible to portray the impacts of inflation and the rise in the cost of living in the country, particularly on citizens living in poverty and/or social exclusion. We were able to analyse some of the government's measures aimed at mitigating the effects of the new crisis facing the country. The report also allowed us to realise that the country is still not very resilient to crises and that people living in poverty are particularly affected. It's therefore not surprising that poverty figures vary little over the years and at times of crisis, the figures become more acute. It is also true that opportunities arise to respond to crises and promote greater social cohesion. Examples of this are the action plan of the European Pillar of Social Rights (at European level) and the action plan of the National Strategy to Fight Against Poverty. However, these will never be fully effective if they do not address the structural and systemic causes of poverty. We are not only faced with inconsistencies and gaps in the policies and measures that are being implemented, but also with political and economic models that do not allow us to change the paradigm of creating a fairer society that respects social rights and, above all, is free of poverty.

Poverty Watch 2024 aims to launch an initial reflection on these issues, and it does so on the basis of the social protection system. Are the deficiencies in the social protection system structural or systemic? Is it possible to separate these two realities? Of course not. These two dimensions are clearly interconnected and combine with other social problems.

Since it wasn't possible to analyse the entire social protection system, we chose to look more specifically at one of the measures that is geared towards the most vulnerable people and aims to meet their most basic needs: the Social Integration Income (SII). It is important to analyse this measure, not only because of its focus on the most vulnerable, but also because it is expected to undergo changes as part of the National Strategy to Fight Against Poverty, and because the Pillar's action plan itself presented a European recommendation to improve minimum income schemes at European level. As far as Portugal is concerned, the European Commission continues to point out the low effectiveness of social transfers in reducing poverty and indicates the Social Integration Income as one of the measures to be improved. The Recommendation itself refers to the importance of *social safety nets in reducing inequalities and social disparities in the member states* and proposes that *social safety nets, especially minimum income schemes, should be modernised and adapted to promote social inclusion and help people able to work to obtain quality employment*. It is hoped that all people will be able to enjoy a *dignified life* and this goal is essential for *building fair and resilient economies and societies*. However, when we analyse measures such as the Social Integration Income, we realise that it is far from enabling a dignified life and that it has been subject to various structural constraints. We also realise that although this is a measure of last resort that reaches the poorest of the poor, its evolution over time has been the subject of political and ideological discussions and visions of poverty and those living in poverty, which in fact have always been an obstacle to its effective improvement, that is, to making it an effective measure in the fight against poverty. So, on the one hand, we have more structural constraints that impact on the operationalisation of the measure, in areas such as coverage, adequacy, administrative management, among others, and, on the other hand, system constraints that result from the social, economic and political context in which we live and which also impact on the effectiveness and efficiency of measures of this nature. Both "sides" are interconnected and we can say that it is practically impossible to dissociate one

dimension from the other. This is clearly visible, for example, during the Troika period, when the eligibility criteria became stricter as a result of the political orientations of the time. In any case, this Poverty Watch endeavours to make this point while highlighting the importance of measures such as the Social Integration Income, calling for them to be effective measures in the fight against poverty and to be levers in the promotion of a dignified life for those who need it most. It's important to send out the message that need can arise at any time in a person's life and this type of measure needs to be a response to need while at the same time acting as a social and economic stabiliser. The way forward should therefore be to improve them effectively, taking advantage of the European and national guidelines that exist at the moment and seeking to go further, both at European level - with the adoption of a European Directive - and at national level with an effective improvement of the measure.

Methodological Note

Poverty watch is a report drawn up with the support of the members of EAPN Portugal's Local Citizens' Councils (LCCs). This report contains a set of testimonies identified throughout the text in italics that resulted from different moments of reflection with members of the Local Citizens' Councils (some beneficiaries and ex-beneficiaries of the measure). At the same time, as part of completing a questionnaire, promoted by EAPN Europe, on the implementation of the "Recommendation on adequate minimum income ensuring active inclusion", reflection sessions were also held with beneficiaries of the SII measure (who are members of the LCCs) and professionals who are implementing and monitoring the measure. Some of the testimonies collected for the questionnaire were also included in Poverty Watch. A moment of reflection was also held with Dr Maria d'Oliveira Martins, a professor at the Faculty of Rights of the Portuguese Catholic University.

EAPN Portugal would like to thank everyone who contributed to the preparation of this document.

A brief portrait of poverty at national level

At-risk-of-poverty rate

The at-risk-of-poverty rate rose to 17% in 2022, according to the latest INE figures¹. 1.779 people had a net monetary income of less than 591€/month.

This rate was higher for women (17.7%) than for men (16.2%). The rate also worsened for all age groups, particularly children (20.7%), followed by the elderly (17.1%) and adults of working age (16%).

From the point of view of household composition, it is single-parent families that have the highest risk of poverty (31.2%), followed by people living alone (24.9%) and extended families (2 adults with 3 or more children, 23.6%). Overall, it is still families with children who are most at risk of poverty (18.9%), although there has also been an increase in households without dependent children (15.2%).

The poverty intensity rate also rose in 2022 to 25.6%, which shows a greater severity of this phenomenon among people living in poverty.

At-risk-of-poverty or social exclusion rate²

The at-risk-of-poverty or social exclusion rate in Portugal in 2022 also worsened, standing at 20.1% (2,104 thousand people). Compared to the European Union, Portugal was 1.5pp. below the European average and ranked 14th out of the 27 member states.

Eurostat's most recent figures, published in June this year³, indicate that 94.6 million people in the European Union were at risk of poverty or social exclusion in 2023. Portugal's rate remains at 20.1% (19.2% for the male population and 20.9% for the female population).

From an age perspective, 22.6% of children are at risk of poverty or social exclusion and 20.2% of older people (aged over 65) are in this situation. The rate rises among older people (aged over 75) to 21.6%.

With regard to the very low per capita labour intensity rate, the proportion of the population under 65 living in households with very low per capita labour intensity was, according to Eurostat, 6.3% (2023)⁴.

¹ INE, *A taxa de risco de pobreza aumentou para 17% em 2022 (At-risk-of-poverty rate rises to 17% in 2022)*, 27 November 2023. Available at: https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=594931817&DESTAQUESmo_do=2

² Percentage of individuals at risk of poverty or living in households with very low per capita labour intensity or in a situation of severe material and social deprivation. In www.ine.pt

³ Eurostat, *People at risk of poverty or social exclusion in 2023*, 12 June 2024. Available at: <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20240612-1>

⁴ Online data code: ilc_lvhl11n. Available at: https://ec.europa.eu/eurostat/databrowser/view/ilc_lvhl11n/default/table?lang=en

The rate of material and social deprivation rose in 2023 to 12.0% and the rate of severe material and social deprivation fell slightly to 4.9%. In the first case, situations are considered in which there is no access to at least 5 of the 13 items listed and in the second case, there is no access to at least 7 of the 13 items.

In 2023, the rate of severe material and social deprivation was 4.4% for children (under 18) and 6.5% for people aged 65 and over.

In the following graph, it is also possible to see that some of the items in the rate will worsen by 2023, of which we would highlight energy poverty (20.8% of the population *cannot afford to keep their home adequately heated*). In the case of food poverty, there has been an improvement, with 2.3% *unable to afford a meal of meat or fish (or the vegetarian equivalent) at least once every two days*.

Graph 1: Material and social deprivation items, Portugal, 2022-2023



Source: INE, Inquérito às Condições de Vida e Rendimento 2022-2023 (Survey of Living Conditions and Income 2022-2023). In

https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=594931817&DESTAQUESmo_do=2

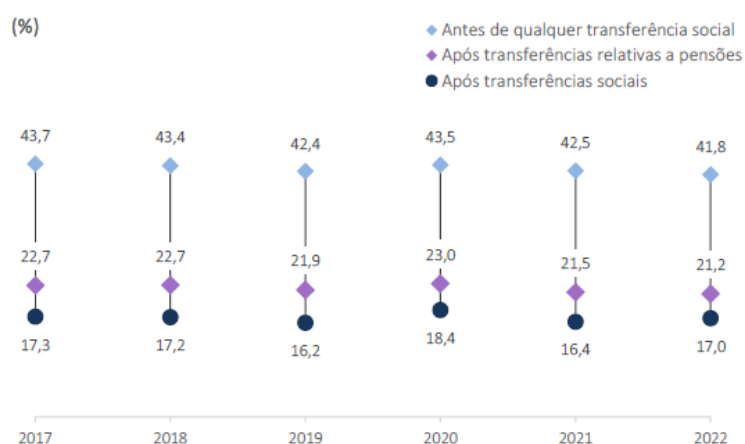
According to data from Pordata⁵, Portugal and Spain share 1st place among the 27 member states with the highest percentage of people in energy poverty (20.8%), followed by Bulgaria (20.7%), Lithuania (20%) and Greece (19.2%).

⁵ See: <https://www.pordata.pt/pt/estatisticas/pobreza/privacao-material-e-social/populacao-sem-capacidade-para-manter-casa>

Social transfers

Social transfers have always had a significant impact on reducing the at-risk-of-poverty rate at national level, although this impact has been decreasing in recent years. The at-risk-of-poverty rate would be 41.8% if we only considered income from labour, capital and private transfers. With retirement and survivors' pensions, the rate drops to 21.2% and with social transfers related to illness and disability, family, unemployment and social inclusion to 17%. The following graph shows the evolution of the at-risk-of-poverty rate over the last few years based on social transfers:

Graph 2: At-risk-of-poverty rate considering social transfers, Portugal, 2017-2022



Source: INE, Inquérito às Condições de Vida e Rendimento 2018-2023. (Living Conditions and Income Survey 2018-2023.)
In https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=594931817&DESTAQUESmo_do=2

Spending on social protection

According to Eurostat data⁶, Portugal's spending on social protection in 2022 was 17.5% (provisional data), slightly lower than in 2021 (18.1%) and than the EU27 average (19.4%). However, this percentage is higher than spending on health (7.1%, provisional data for 2022) and education (4.3%, provisional data for 2022).

With regard to housing and community facilities, expenditure stood at 0.5%⁷.

⁶ Eurostat, *General Government expenditure by function*, last update 22/07/2024. In: https://ec.europa.eu/eurostat/databrowser/view/tepsr_sp110_custom_12429850/default/table?lang=en

"These indicators present total general government expenditure dedicated to three different socio-economic functions (according to the Classification of General Government Functions - COFOG), expressed as a ratio of GDP. The COFOG divisions covered are 'health', 'education' and 'social protection'."

"The COFOG classification allows an analysis of total general government expenditure according to its socio-economic purpose - in other words, "why" general government spent money," in Eurostat

⁷ See, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Government_expenditure_by_function_%E2%80%93_COFOG#General_government_expenditure_by_function

Beneficiaries of social benefits⁸

In 2023, the number of families benefiting from the **Social Integration Income** was 122,133, slightly less than in 2022, when it was 130,004. The number of beneficiaries totalled 240,618 in 2023 and 262,671 in 2022. In terms of profile, women (103,669) outnumber men (91,815) and it is still the group of children (< 18 years old) that stands out most in terms of the number of beneficiaries (30,442 female children and 32,662 male children), followed by the groups aged over 55.

From a household point of view, the group of individuals continues to prevail (63,897), followed by two-person households (41,474). The districts of Porto and Lisbon stand out in terms of the high number of beneficiaries, 57,808 and 48,649 respectively.

In terms of values, in December 2023 the average benefit per beneficiary was €134.35 and per family €284.11.

With regard to the **Solidarity Supplement for the Elderly**, in 2023 there were 169,251 beneficiaries of this benefit, slightly more than in 2022 (162,649). More beneficiaries were female (117,149) than male (52,102). In terms of age, the 75 to 79 age group for women and the 70 to 74 age group for men stand out. Here again, it is single people who claim this benefit the most (62.3 %), followed by two-person households (22 %).

The average monthly instalment was 157.43€.

When it comes to benefits for the elderly, it's also important to look at **pensions**. In 2023, the total number of pension beneficiaries was 3,020,960, of which 2,117,487 were old-age pension beneficiaries, 162,472 were disability pension beneficiaries and 741,001 were survivors' pension beneficiaries. Women outnumber men in the number of beneficiaries, 59.97 % and 40.03 % respectively.

Poverty and regional inequalities

Portugal has profound regional inequalities in terms of poverty. The at-risk-of-poverty rate increased significantly in the Lisbon Metropolitan Area (+4.3pp) in 2022, standing at 14.7%. There was also an increase in this rate in the Autonomous Region of the Azores (+1pp).

Overall, it is the autonomous regions of the Azores and Madeira that have the highest at-risk-of-poverty rates, 26.1% and 24.8% respectively in 2022, followed by the Algarve with 19.7%, although in this region there has been a drop compared to the previous year (22.1% in 2021).

There was also a drop in the northern region of 1.2pp, but it still has the second highest at-risk-of-poverty rate (18.8 %) on the continent.

With regard to the **poverty or social exclusion rate**, the Lisbon Metropolitan Area (3.8pp) and the Autonomous Region of the Azores (1.1pp) saw increases between 2022 and 2023, with rates of 18.3% and 31.4% respectively. However, the highest rates remain in the Autonomous Regions (31.4% Azores and 28.1% Madeira).

⁸ Available at <https://www.seg-social.pt/estatisticas>

From the point of view of **very low labour intensity per capita**, it was the autonomous region of the Azores that recorded the highest value (8.9%) and the biggest increase (+2.9pp) was recorded in the Lisbon Metropolitan Area (8.3%) (data for 2022).

With regard to the **rate of severe material and social deprivation**, it is the autonomous regions of the Azores and Madeira that have the highest rate, 12% and 6.3 % respectively. However, between 2022 and 2023, it was in Lisbon Metropolitan Area and autonomous region of the Azores that the rate increased between those years. In all the other regions the rate fell.

Employment, Unemployment and Poverty

In April 2024⁹, the employment rate was 64.3%, higher for men (67.7%) than for women (61.2%). Provisional figures for May point to a slight drop in this rate (64.2%) and for both groups (men, 67.6% and women, 61.1%). Youth employment (aged between 16 and 24) stood at 28.4%, down on the previous month (29.6%).

The unemployment rate in April was 6.4% and was higher for women (7.1%) than for men (5.7%). In May, estimates indicate a worsening of this rate overall (6.5%) and for men (6.0%). The youth unemployment rate worsened in May (23.0%) compared to the previous month (21.7%).

In the European Union as a whole, Portugal has one of the highest youth unemployment rates (20.3%, 2023) (8th place), 5.8pp more than the EU average (14.5%).

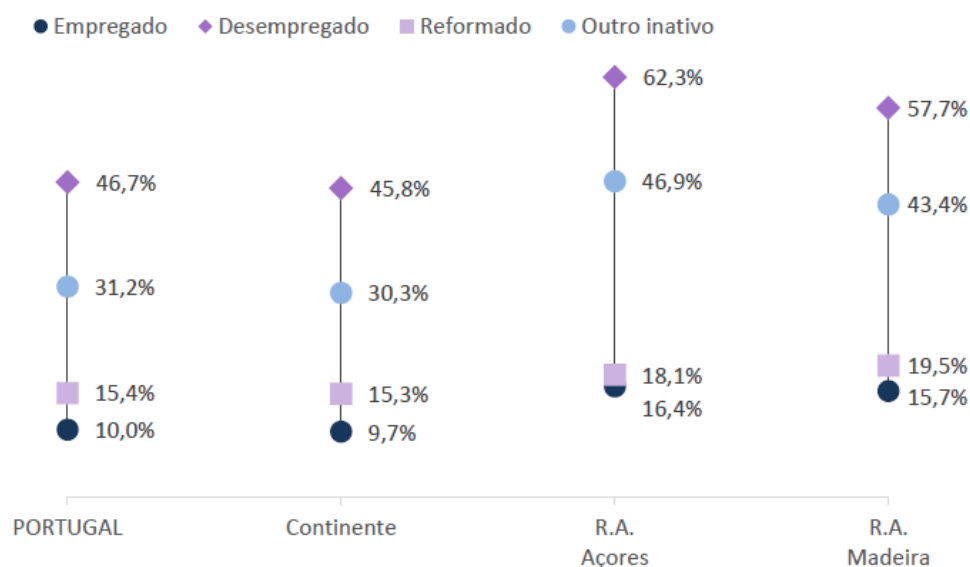
From the point of view of poverty¹⁰, in 2022, 46.7% of the unemployed population was at risk of poverty and 10% of the employed population was in this situation. For the retired population the rate was 15.4% and for the inactive population 31.2%.

The at-risk-of-poverty rate for employees was higher for those working in the private sector (9.7%) compared to those working in the public sector (3.9%). It should be noted that the at-risk-of-poverty rate is more significant for those who work fewer hours (1 to 30 hours a week), i.e. those in part-time work are more vulnerable to poverty (6.8% in the public sector and 22.7% in the private sector).

The following image shows the regional differences in these rates in Portugal. The autonomous regions of Madeira and the Azores also stand out for having higher rates for all these groups, particularly for the unemployed population (more than half of unemployed people are in poverty).

⁹ INE, *Estimativas mensais de emprego e desemprego, maio de 2024* (Monthly employment and unemployment estimates, May 2024), 1 July 2024. Available at: https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=645342916&DESTAQUESmo_do=2

¹⁰ INE, *O risco de pobreza da população desempregada foi cinco vezes o da população empregada* (The risk of poverty of the unemployed population was five times that of the employed population), 20 February 2024. Available at: https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=634242010&DESTAQUESmo_do=2

Graph 3: At-risk-of-poverty rate according to labour status, Portugal and NUTS I, 2022

Source: INE, Inquérito às Condições de Vida e Rendimento 2023 (Living Conditions and Income Survey 2023), in https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=634242010&DESTAQUESmo_do=2

Data also shows that the at-risk-of-poverty rate worsens as the time spent unemployed increases. The at-risk-of-poverty rate for the long-term unemployed (those who have been unemployed for at least 12 months) was 50.5% in Portugal in 2022.

As far as the poverty or social exclusion indicator is concerned, the situation is particularly more serious for unemployed people (59.2%) than for employed people (11.3%). The same is true for the indicators of severe material and social deprivation and very low per capita labour intensity, which for the unemployed population were 16.3% and 59% respectively.

Education and Poverty

Education makes a positive contribution to reducing the risk of poverty. According to INE data¹¹, 22.6% of the population who had only completed basic education were at risk of poverty in 2022. This risk decreases as the level of education rises, standing at 5.8% for those who have completed higher education.

Here again, the autonomous regions of Madeira and the Azores stand out for the severity of poverty for people with only basic education, 31.3% and 34% respectively.

Parental schooling also has an impact on the risk of poverty among young people. According to INE, "The risks of poverty in 2022 were 17.3% and 17.2%, respectively, for those whose father or mother had not completed more than the current basic education, just above the national average (17.0%), but substantially lower for those whose parents had completed secondary, post-secondary non-

¹¹ INE, *O risco de pobreza da população desempregada foi cinco vezes o da população empregada* (The risk of poverty of the unemployed population was five times that of the employed population), 20 February 2024. Available at: https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=634242010&DESTAQUESmo_do=2

university or higher education by the age of 14 (6.8% when it was the father; 8.6% when it was the mother)"¹²

¹² INE, *O nível de escolaridade é maior, e o risco de pobreza menor, para aqueles que, aos 14 anos, viviam com progenitores que tinham concluído o ensino superior* (The level of schooling is higher, and the risk of poverty lower, for those who, at the age of 14, lived with parents who had completed higher education), 8 March 2024. Available at: https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=639506103&DESTAQUESmo_do=2

An overview of the social protection system in Portugal

Poverty is a multidimensional phenomenon and, as such, fighting it requires integrated responses aimed first and foremost at tackling the structural causes of poverty. The fight against poverty always falls short of what is needed because the policies and measures that are defined are not preventive in nature and do not address the root of the problem. As the responses to the fight against poverty are built from the outset on the basis of strong fragility, they consequently end up being less capable of effectively lifting people (families) out of poverty. Many of these public policies are implemented in a context that is unfavourable to the fight against poverty. They thus have a positive impact on reducing the severity of poverty and its more negative impacts, but they keep these families in poverty and are unable to stop their generational reproduction. One of the examples that can be listed is the one that forms the basis of the current report, i.e. the measures of the non-contributory system which, despite their relevance, have been unable to prevent or lift families out of (monetary) poverty. The value of the social benefits associated with the non-contributory system is very low and in the case of the contributory system, precarious labour and low wages push many population groups out of the protection system. The system of social minimums in Portugal, which includes measures such as the Social Integration Income, the Solidarity Supplement for the Elderly, the Social Benefit for Inclusion and others, remains ineffective in reducing poverty, although it has undergone some changes over the years. According to the Commission's Country Report for Portugal, "The impact of social transfers (excluding pensions) on poverty reduction in 2022 remains low (23.7% against an EU average of 35.0%). Access to social protection is a challenge: many workers do not have sufficient formal coverage or have inadequate coverage and insufficient benefits. A low percentage of temporary and self-employed workers receive social benefits (respectively 24.8% against 44.9% in the EU and 2.9% against 16.5% in the EU) and suffer from higher rates of poverty and social deprivation."¹³

According to the glossary of public finance terms, the "Citizenship Social Protection System is part of the Social Security System, which aims to guarantee the right to vital minimums for citizens in situations of economic need, prevent and eradicate situations of poverty and social exclusion and compensate citizens for increased family burdens, as well as in the field of disability and dependency. It includes three subsystems - the Social Action Subsystem, the Solidarity Subsystem and the Family Protection Subsystem - and is funded by transfers from the State Budget and tax revenue."¹⁴

Portugal has had a Basic Social Security Law since 1984 (Law no. 28/84 of 14 August), but it is important to highlight Decree-Law no. 513-L/79 of 26 December, which established a minimum (universal) social protection scheme, and Decree-Law no. 160/80 of 27 May, which establishes a scheme of social security benefits for non-beneficiaries of the contributory system. The 1979 Decree-Law materialises "a significant step towards meeting basic needs with the establishment of a minimum social protection scheme that covers all resident nationals, regardless of employment or prior contribution, and includes health and social security benefits." This minimum social protection scheme is, according to the same law, made up of a minimum health scheme and a minimum social security scheme. With Decree-Law 160/80, some changes were made, among which we highlight the

¹³ European Commission, *2024 Country Report - Portugal*, Brussels, 19.6.2024 SWD(2024) 622 final. Available at: https://economy-finance.ec.europa.eu/publications/2024-european-semester-country-reports_en

¹⁴ In Public Finance Council. <https://www.cfp.pt/pt>

verification of a means test: "that access to the social protection scheme must presuppose the verification of a means test obtained by an index of reference to the national minimum wage, in accordance with the stated objectives of social protection of the most disadvantaged."

With the 1984 Basic Law, the system's objectives were defined:

- "The social security system protects workers and their families in situations of lack of or reduced capacity for work, involuntary unemployment and death, and guarantees compensation for family burdens.

- The social security system also protects people who lack or have fewer means of subsistence."¹⁵

The law also lists a number of central principles of the system so that everyone can benefit from it: universality, unity, equality, efficiency, decentralisation, a judicial guarantee, solidarity and participation.

The law was first revised in 2000. Law no. 17/2000 of 8 August reiterates in article 3 that "everyone has the right to social security"; extends the principles of the system to other central ones such as equity and positive differentiation; and structures the system into three subsystems: the citizenship social protection subsystem, the family protection subsystem and the welfare subsystem. Article 32 of the same law states that "within the scope of the conditions for granting benefits under the solidarity scheme¹⁶, whenever appropriate, the beneficiaries must make a contractualised commitment to integration and effectively comply with it". This indication is particularly important because of the **link established with the social integration** of the people receiving these benefits, which reveals a more global dimension to these measures beyond the purely economic/pecuniary field. The guaranteed minimum income created in 1996 is a case in point.

The 2000 Law was repealed in 2002 (Law no. 32/2002 of 20 December) and it was with Law no. 4/2007 of 16 January that the general bases of the social security system were approved. The first amendment to the Law was made with Law no. 83-A/2013 of 30 December, establishing that the "social security system covers the citizenship social protection system, the welfare system and the complementary system".

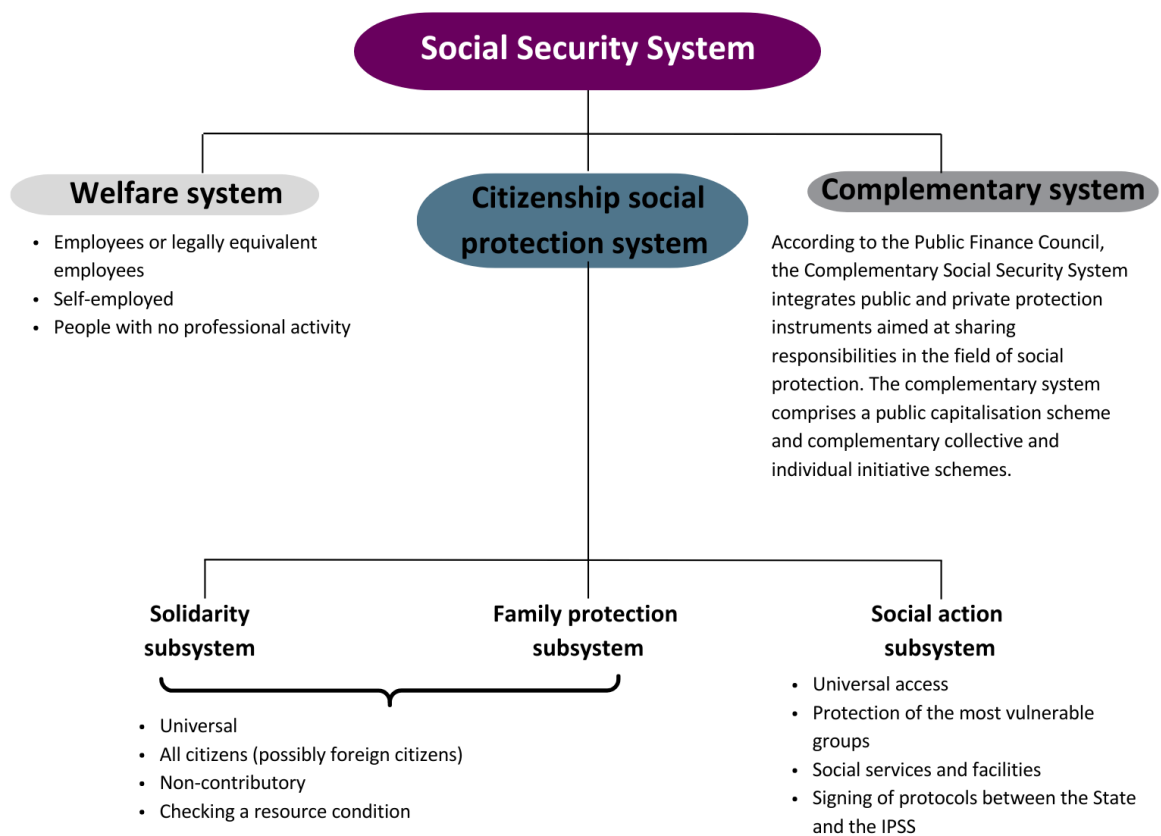
The following table shows some characteristics of the system¹⁷:

¹⁵ In <https://diariodarepublica.pt/dr/detalhe/lei/28-1984-382393>

¹⁶ This includes minimum income benefits and others.

¹⁷ According to the Public Finance Council, the Complementary Social Security System integrates public and private protection instruments aimed at sharing responsibilities in the field of social protection. The complementary system comprises a public capitalisation scheme and complementary collective and individual initiative schemes. In: <https://www.cfp.pt/pt/glossario/sistema-complementar-de-seguranca-social>.

The table was drawn up on the basis of information available at: www.cfp.pt; and CFP, *Sistemas de Proteção Social. Apontamento nº 2/2014 (Social Protection Systems. Note no. 2/2014)*, Lisbon, October 2014. Available at: https://www.cfp.pt/uploads/publicacoes_ficheiros/cfp-sistema-protecao-social.pdf



Social benefits

- Under the Solidarity Subsystem (reduce exposure to the risk of poverty and social and professional exclusion; risks associated with invalidity, old age and death):
 - Social Integration Income
 - Solidarity Supplement for the Elderly
 - Social supplements for invalidity, old age and death pensions
 - Unemployment and sickness benefits that guarantee minimum levels of income
- Under the Family Protection Subsystem (to compensate for family expenses):
 - Family allowance
 - Disability and dependency costs (e.g. life allowance and dependency supplement)

The social security budget includes the Citizenship Social Protection System and the Welfare System.

Guaranteeing social minimums:

From the brief analysis of the social protection system presented above, we can see that over the years Portugal has implemented different measures aimed at guaranteeing minimum subsistence for people in situations of social and economic vulnerability. The consecration of social security as a **Right** for all people is the first point to emphasise.

Central aspects such as the condition of resources, the link with the axis of social insertion, adequacy, the way benefits are calculated (initially the reference to the minimum wage and later to the Social Support Index), access criteria, funding and even the way they are perceived by society in general, have impacted (and still impact) the effectiveness and efficiency of these measures, on the one hand, in promoting a level of income that is indispensable for living a dignified life and for full participation in society¹⁸ and, on the other hand, in reducing poverty. The Social Integration Income is the most striking example of this and is one of the measures that has generated the most public debate, often influenced by different political orientations.

The Guaranteed Minimum Income (GMI) was established in 1996¹⁹. The GMI law of 29 June 1996 came into force on 1 July 1997. It was decided to implement the measure in an experimental phase through pilot projects that began on 1 July 1996. This phase was accompanied by an evaluation system that was developed throughout 1997 as part of a project by the Centre for Research and Studies in Sociology (CIES) and the European Anti-Poverty Network/Portugal²⁰.

On 28 September 1996, a European seminar on MI was held in Lisbon, organised by the Union of Portuguese Mutualities, with the joint support of the European Commission and the Ministry of Solidarity and Social Security. This event resulted in a publication by Pierre Guibentif and Denis Bouget²¹, which outlines some of the difficulties and problems in implementing the measure in other countries.

A very important issue in the implementation of the GMI was the territorialisation of the intervention through the creation of the Local Insertion Centres (LIC), a strong driver of the role of local authorities in the implementation of this policy measure and a new way of implementing the so-called welfare state.

In 2003²², the measure was renamed Social Integration Income. A change that sought to reinforce the social insertion dimension of the benefit and thus try to counteract existing stereotypes about the measure and its beneficiaries. Law no. 13/2003, of 21 May, shows a broadening of the insertion programme's actions. In Pereirinha's study on the Social Minimum Scheme in Portugal, he says of

¹⁸ According to EAPN's vision, as defended in the EMIN Project, minimum income schemes are adequate when they provide a level of income that is indispensable for living a dignified life and participating fully in society, and should be regularly updated to take account of changes in the cost of living.

The EMIN project was promoted by EAPN Europe in two phases (2015-2016 | 2017-2018) and aimed to contribute to the implementation of adequate, accessible and empowering minimum income schemes. More information: <https://www.eapn.pt/investigacao-e-projetos/projetos-transnacionais/projeto-emin-ii-european-minimum-income-network-ii-105/>

¹⁹ Law no. 19-A/96, of 29 June. Available at: <https://diariodarepublica.pt/dr/detalhe/lei/19-a-1996-306009>

²⁰ Luis Miguel Capucha (coord.), *Rendimento Mínimo Garantido: Avaliação da Fase Experimental (Social Integration Income: Evaluation of the Experimental Phase)*, Lisbon, Centre for Research and Studies in Sociology, 1998.

²¹ Pierre Guibentif and Denis Bouget, *As políticas de Rendimento Mínimo na União Europeia (Minimum Income policies in the European Union)*, Lisbon, União das Mutualidades Portuguesas, 1997.

²² Law no. 13/2003, of 21 May. Available at: <https://diariodarepublica.pt/dr/detalhe/lei/13-2003-541856>

the change in name that "This was justified by the government's view of this measure, which was seen as a last resort, of a transitional nature, aimed at social integration and, therefore, a social investment policy for access to better living conditions. The various policy changes under this proposal fit in with these views and the political diagnosis behind them."²³

In 2002, as part of a process of collaboration with the National Action Plan for Inclusion (PNAI)²⁴, EAPN Portugal organised a series of six regional forums to listen to the beneficiaries of the Guaranteed Minimum Income and a national meeting²⁵. These meetings highlighted some of the weaknesses that still exist in the measure and some of its potential that still prevails. Among the weaknesses, we highlight the lack of information and clarification about how the measure works and the duties inherent to it, as well as the bureaucracy. Also noteworthy is the feeling of discrimination and the difficulty of finding a stable job with a steady income. Access to services other than employment stood out as a necessity for integration. From the point of view of potential, it should be emphasised that the measure itself was never questioned; on the contrary, it was highlighted as a "stepping stone to hope". Access to a benefit and the possibility of accessing education, training and eventually getting a job was also highlighted as positive, although there is an understanding that this employment cannot be precarious. We emphasise this work because it was the first time that a large-scale consultation process had been carried out with the beneficiaries and with this measure in particular. Despite the measure's evolution, some of the ideas raised still prevail today. And this is largely due to the opinions and political diagnosis referred to by Pereirinha.

One of the measure's greatest weaknesses has always been its level of **adequacy**. In December 2004, the average value of the benefit per family was €181.98, and in December 2023 this value is €284.11. These figures are very far from the poverty line and place this benefit at the lowest level when compared to others that also target vulnerable people, such as the Solidarity Supplement for the Elderly (SSE). Determining the amount depends on the Social Support Index (SSI) and the fluctuations it has undergone have not contributed to improving the adequacy of this benefit. The SSI in 2007 was €397.86 and in 2024 €509.26²⁶, i.e. close to the poverty line. However, the SSI was "frozen" in the years of the previous economic crisis, during which Portugal was subject to external intervention by the Troika. Between 2010 and 2016 there was no update to the SSI and this had a negative impact on the value of the SII. In 2021, still during the pandemic, there were no changes to the SSI either and it was only from 2023 onwards that there was an increase in the index. This measure made it possible to increase the value of the SII, but it was the Solidarity Supplement for the Elderly (SSE) that saw the biggest increase, with this benefit now standing at €600/month, i.e. above the poverty threshold. This improvement in the SSE is part of a set of government measures aimed at improving

²³ José António Pereirinha and Elvira Pereira (coord.), *Regime de Mínimos Sociais em Portugal. Evolução do discurso político e das políticas (Social Minimum Standards in Portugal. Evolution of political discourse and policies)*, Edições Almedina, Coimbra, 2022, p.286.

²⁴ "Considering the European Union's guidelines on employment strategy, the fight against poverty and exclusion and the modernisation of social protection systems, the NAP focuses on responding directly to the needs of individuals and families - the effort to focus public support on the most deprived groups should be accentuated - promoting employment and lifelong learning, reconciling work and family life, fighting against extreme forms of poverty and child poverty, among others." In <https://on.eapn.pt/acometimento/resolucao-do-conselho-de-ministros-n-o-91-2001-aprova-o-plano-nacional-de-accao-para-a-inclusao/>

²⁵ The conclusions of these meetings are gathered in the publication: Sérgio Aires (Coord.), *Activar a Participação – um processo em construção (Activating Participation - a process under construction)*, Redacção nº 2, REAPN, Porto, 2004.

²⁶ Information available at: <https://www.dgaep.gov.pt/index.cfm?OBJID=3E74CF19-DA87-4B8F-81E2-51E0649AAA9F>

the living conditions of the poorest elderly people and it is intended that this benefit will gradually reach 820€/month by 2028²⁷.

In the case of the SII, as Maria d'Oliveira Martins says, *"The amount is so low that it doesn't even reach the poverty line. In fact, the amount of the SII is 40% of the poverty line. Compared to Europe, we can see that this wouldn't necessarily have to be the case. There are countries that set the value of this minimum income based on the value of the basket of essential goods. We don't have that calculation. Ours is clearly insufficient to cover essential needs. It doesn't cover things like food and housing."*

The increase in the amount of the SII is important, but it remains clear that it will not allow people to meet their expenses, particularly at a time of high inflation and rising living costs. Fernanda Rodrigues, in an interview with the newspaper Expresso, said: "People who receive the SII [Social Integration Income] are also going to be more impoverished. What they receive from the SII will be less than it was until now, which means that they will be in a more precarious situation."²⁸

"At national level, the "Social Integration Income" (SII) is an important measure to prevent people from falling into a limit situation. "It helps to survive, but not to live a decent living"

(Portuguese delegation to the European Meeting of People Experiencing Poverty, 2024)

"It's very important that the SII exists so that people can live with dignity when they live without income, without family support, so that they can have some support. It won't cover all the expenses, but it's very important"

"If we look at the measure from the perspective that it brings some income to the family when they are in a situation of greater need and vulnerability, it does bring something that can meet basic needs. If it wasn't done in this way, this could possibly be the case"

(Members of the Local Citizens' Councils - LCC)

It is also clear from the testimonies that, although the value of the SII is not appropriate, its existence cannot be called into question, as it is a first-line emergency response that, if it didn't exist, would leave people in a much more fragile situation.

In terms of the amount of the benefit, there is another aspect that has created obstacles to accessing the measure, and that has to do with the **calculation rules**. The amount of the SII is calculated according to "the composition of the household and the income of the household (or of the individual, if they live alone)."²⁹ This means, at the moment, the full amount (100 %) for the recipient (€237.25), 70 % of the amount for the second adult (€166.08) and 50 % for each child (€118.63). During the troika period, the rules were changed, which led to a significant reduction in the amount (100 % for the holder; 50 % for the second adult and 30 % for each child). During the period of

²⁷ This measure also approved free medicines for SSE beneficiaries. More information: <https://www.portugal.gov.pt/pt/gc24/comunicacao/noticia?i=complemento-solidario-para-idosos-aumenta-50-euros-ja-em-junho>

²⁸ "The RSI [SII] came to reduce poverty, but so far it has only reduced the severity of poverty. It hasn't lifted a single person out of that situation", Expresso newspaper, 5 December 2022. <https://expresso.pt/sociedade/2022-12-05-O-RSI-veio-para-diminuir-a-pobreza-mas-ate-agora-so-diminuiu-a-severidade-da-pobreza.-Nao-retirou-uma-unica-pessoa-dessa-situacao-8d05c944>

²⁹ In <https://www.seg-social.pt/rendimento-social-de-insercao#>

austerity (Troika), the most vulnerable people were heavily penalised with cuts to a measure that was already well below the poverty line.

Another aspect to consider when switching between the GMI (Guaranteed Minimum Income) and the SII is the **duration of the benefit**. The 1996 law states that the "minimum income benefit is granted for a period of 12 months, renewable automatically". The possibility of automatic renewal disappears in the 2003 Law, which states that the "Social Integration Income is granted for a period of 12 months, and may be renewed upon presentation by the holder of the means of proof legally required for renewal". A change that restricts access to the measure, as failure to submit a document can cause major delays in the whole process.

Currently, this situation has been simplified and renewal is "carried out unofficially by the services of the competent management entity, based on the household and income contained in the Social Security information system."³⁰

Making it easier to renew is important, especially as this is a very bureaucratic measure, requiring several forms to be filled in and several documents to be submitted. This in itself can put people off the measure, as potential beneficiaries are often people with low qualifications. However, once the process is complete, receiving the benefit is relatively quick (30 days). This is because the **integration contract** is defined and signed afterwards (maximum 45 days), which means that, unlike during the troika period, payment of the SII does not depend (at the moment) on the contract being signed, but it remains an obligation of the measure. If the contract is not signed afterwards, the benefit is cancelled and you can only require for it after 24 months³¹.

One aspect pointed out by the professionals involved in monitoring the measure is that the immediate award of the benefit is important, however, as the whole process is evaluated later, this can also lead to the amount being updated. This is a problem if the amount is adjusted downwards, as it creates a debt for the beneficiary.

"Applying for the measure now is easier. The injunction is granted. Sometimes this also creates some constraint because if at the beginning they may not have been entitled, if they have received it in the meantime, if they have to replace it, it's another constraint. This wasn't the case before, because the SII was only granted after a technical analysis and assessment. Not anymore. It's granted administratively. It's more help for the family, but sometimes it benefits, sometimes it harms."

(SII technician)

Speeding up renewal and reducing the waiting time to receive the benefit are aspects that contribute to improving the **coverage** of the measure. However, they are not enough. In the period of the Troika³², during which access criteria were tightened but the at-risk-of-poverty rate increased, we saw a decrease in the number of beneficiaries. The report by the Office for Strategy and Planning

³⁰In <https://www.seg-social.pt/rendimento-social-de-insercao#>

³¹ In the case of household members who do not sign a contract, the suspension is 12 months.

³² In 2010, the government approved Decree-Law 70/2010, which pointed to more restrictive changes in access to the measure. "(...) three major changes were made with the approval of Decree-Law 70/2010: the change in the concept of family as the unit benefiting from the social benefit (which becomes more similar to the concept of household used in poverty analyses: all relatives who live and share resources with the benefit recipient are considered part of the family), the use of a more comprehensive income concept (including non-monetary income categories, such as housing benefits) and the change in the equivalence scale (using the original OECD scale)", in José António Pereirinha e Elvira Pereira (coord.), Op. Cit, Coimbra, 2022, pp. 290-291.

(GEP) states that "since 2010, not only has the SII reduced its coverage of the officially poor population, at a time when this population was increasing, but it also shows a loss of effectiveness in covering the poorest population, i.e. the population below the threshold of 40 % of the equivalent median income."³³ The annual data from ISS, I.P.³⁴ also indicates this decrease in recent years (2022-2023), which are years of greater deterioration in the social and economic situation (rising inflation and the cost of living) and also an increase in the at-risk-of-poverty rate. This situation could be explained by the **access criteria** that leave out people who, despite being in poverty, are unable to be covered by the measure. Fernando Diogo offers some explanations when referring to the situation in the Autonomous Region of the Azores, where the at-risk-of-poverty rate is one of the highest in the country and where there has also been a reduction in the number of beneficiaries. The researcher mentions "the support criteria" and "the way it is allocated" and "a more restrictive interpretation of the Law"³⁵ as possible reasons for this decrease. Maria D'Oliveira Martins also points out that *"there are factors [in the SII] that have nothing to do with the condition of resources, for example, verification of involuntary unemployment, registration with the employment centre, residence in Portugal for more than 6 years, and authorisation to access all relevant information to assess the economic and financial situation. There are therefore requirements that do not allow universal coverage for all those who would need to benefit from the SII."*

The access criteria and the rules for calculating the beneficiary's income are important dimensions in this type of benefit, as they can prevent people from accessing it who, despite needing the support, don't receive it because they don't fit one of the established criteria. The most recent example of changes in access criteria can be seen in the Solidarity Supplement for the Elderly (SSE). This support measure for the elderly on low incomes used to include the income of their children, even if they had no connection to the person. This rule was revoked in June this year and it is thought that it could have a positive effect on increasing the coverage rate of the measure.

In the case of the SII, we also believe that it is essential to evaluate the rules for access to the measure and the calculation formula in order to allow it to be more comprehensive. For example, during the troika period, when the rules for accessing the SII were tighter, anyone with a car worth 25,000 euros could not access the measure. This criterion was revoked in 2017 with the entry of the new government. In the same vein, those who were in prison were also unable to apply for SII. This is now possible both for those who are in pre-trial detention and for those who are temporarily sheltered in social centres. In both situations, the application can be made 45 days before release/discharge and received in the month of release/discharge³⁶.

In one of the moments of reflection held at³⁷ with professionals who are implementing the measure, there is an understanding that *"a lot has changed in the legislation"*, but *"some things are still unclear"*

³³ Strategy and Planning Office (GEP); Ministry of Labour, Solidarity and Social Security (MTSSS), *Rendimento Mínimo em Portugal. 20 anos de RMG/RSI (Minimum Income in Portugal. 20 years of RMG/RSI)* (September 2019), Lisbon, July 2021. Available at: https://www.gep.mtsss.gov.pt/documents/10182/79620/RSI_20anos.pdf/8c2d70b1-6b80-4b3b-93dc-cb44d59be2c8

³⁴ See: https://www.seg-social.pt/estatisticas-detalle/-/asset_publisher/GzVlhCL9jqf9/content/rendimento-social-de-inserc-8?filter=anual

³⁵ Comment by Fernando Diogo to Público newspaper: "Pobreza: quatro anos depois, os relatos de quem vivia do RSI" ("Poverty: four years later, the stories of those who lived on the RSI"), Público newspaper, 15 June 2024. Available at: <https://www.publico.pt/2024/06/15/sociedade/reportagem/pobreza-quatro-anos-relatos-vivia-rsi-2093908>

³⁶ See: <https://www.seg-social.pt/rendimento-social-de-insercao>

³⁷ As part of completing a questionnaire on the implementation of the "Recommendation on adequate minimum income ensuring active inclusion", promoted by EAPN Europe, a number of reflection sessions were held with beneficiaries of the

(specifically regarding who has access, who doesn't, under what circumstances they don't)". An example is given of the situation of people who come from other territories, particularly migrants:

"They are from the CPLP, they are not; they come as students and they have or do not have the right (this is still not clear in the law). For us it's clear because a young person in a family covered by the SII is still entitled. They are displaced from their household for study reasons. He doesn't need to be registered with the IEFP and the family continues to have their child who is displaced, for study reasons, as part of their household and to receive their share of the SII. But when a young person comes from Guiana, etc., some come to study and others even as tourists, others for health reasons, but those who come to study, their territory of origin is not in the national territory. They are older. They are registered with the IEFP. If they don't have the constraints of being registered with the IEFP, it's because they are in a position to be offered a job, even if they are students... There are many things that need to be clarified, even by force of law."

(RSI Technician)

The **link to the labour market** is another important dimension of the measure that also reveals obstacles. The fact that this is a population with low qualifications also hinders access to quality employment and a reduction in the length of time spent on the measure. In the case of the interior of the country, other obstacles include the lack of employment and greater difficulty in directing people towards the labour market, lack of access to transport and even access to other services, such as housing.

Employment may not be the first answer, but training is. However, here too there is doubt about the suitability of the training to the needs of the people and territories and about the quality of the training. Added to this is **individualised support**. The measure involves an **integration contract and a manager**, but in many cases the follow-up has to be very close and continuous, and the teams themselves struggle with difficulties and a lack of human resources.

It should be noted that, as part of the process of transferring competences to local authorities in the field of social action, the preparation of technical diagnosis and monitoring reports and the allocation of occasional cash benefits in situations of economic deprivation and social risk, as well as the signing and monitoring of integration contracts for SII beneficiaries, are now the responsibility of the municipalities. In the latter case, municipalities may contract with social solidarity institutions or similar organisations³⁸.

Inclusion through employment is also a narrow view of inclusion itself. SII recipients are often accused of being subsidised and unwilling to work. This stereotype is often perpetuated (and has been over the years) in political speeches and in the media. In fact, inclusion in employment is sometimes done in precarious and/or temporary jobs that don't always allow for effective inclusion in the labour market. At other times, people need to fulfil other needs that also require time.

SII measure and professionals who are implementing and monitoring the measure. Some of the testimonies collected were included in Poverty Watch.

³⁸ See: Decree-Law no. 55/2020 of 12 August. Available at: <https://portalautarquico.dgal.gov.pt/pt-PT/transferencia-de-competencias/acao-social/>

See: EAPN Portugal, *The transfer of competences to municipalities and inter-municipal entities*. In Analysis no. 38, September 2022. Available at: https://www.eapn.pt/wp-content/uploads/2022/09/Em-analise_n-38_2022.pdf

"Work has always been a pillar in the fight against poverty. Regenerating people doesn't simply mean giving them an income. It involves rehabilitating them in integral terms so that they can rejoin society. The SII also has to go hand in hand with working on people's integral rehabilitation. Treating people as people."

(Maria d'Oliveira Martins)

The dimension of working on the "whole" person ends up being sidelined by the more economic dimension of the measure and by this labour market-oriented vision, which often fails to integrate people.

In other cases, the stereotype about the measure and its beneficiaries also arises from the lack of knowledge that a large proportion of SII beneficiaries are children, so they can't work, or people over the age of 55, for whom it is more difficult to integrate into the labour market. In any case, this has been the stereotype most often levelled at beneficiaries, and one that is becoming more pronounced:

"I understand these movements as the appeal of what people want to say, but don't dare (...) Before there were no [far-right parties] and I already heard people calling me a rascal, go to work... Except that this has been amplified [now] by the mass media because of the presence of a leader who makes a lot of noise in the mass media (...) Now we are experiencing another new situation, of people against other people."

(António Monteiro, member of the Aveiro Local Citizens' Council)³⁹

There are many factors that condition inclusion in the labour market and people's autonomy, and we can highlight and summarise the following from our discussions with technicians and beneficiaries:

Firstly, the inadequacy of the benefit. The benefit received does not allow for economic independence and many people resort to odd jobs or undeclared work to make ends meet. These odd jobs are done "on the quiet" because people are afraid of losing their support. Odd jobs are necessary because entering the quality labour market is not automatic and because people need to meet their daily needs (food, clothing, housing, among others):

"The fact that income is very low creates problems in terms of poverty. It doesn't solve the problem of poverty. It makes people vulnerable. It makes people susceptible to being exploited by others."

(Maria d'Oliveira Martins)

"People take advantage of odd jobs because the measure is clearly insufficient. People are considered incompetent and lazy. There's no information about odd jobs, because that's what they are, odd jobs. They last a day or two and then what?"

"What I earn from the SII is all for the house. I don't keep any money for myself. How can I manage all month if I don't do odd jobs on the sly?! I have friends who live in the countryside and when they kill chickens, they give me a chicken. I'm getting old and no-one will give me a job any more".

(LCC members)

This last testimony points to another constraint, which is that the focus of these measures is too much on activation by the labour market, and in reality, the labour market is not capable of absorbing people of advanced age (as the testimony indicates) and even those with other associated problems

³⁹ António refers in this extract to the time when he was a beneficiary of the SII. This testimony is part of the EAPN Portugal Podcast Poverty in Dialogue #1 *Democracy and social rights: milestones and achievements* (Season 2). Available at: https://www.youtube.com/watch?v=HGorIjyHb14&list=PL4KUIFyxaRACGeF9bl_m5RXCBFwMYxE7j&index=2

such as mental illness. If you add to this the situations of low education/low qualifications, you realise that many of these people will find it very difficult to get employed and leave the measure.

"Low levels of schooling are a constraint on entry into the labour market. There are still illiterate people who can't get a job. The IEFP used to be able to run literacy courses (...) There are no such courses at the job centre, only at the education level."

(SII technician)

Training has also been a response, but it is important to understand what kind of training is being given to these beneficiaries and whether it meets their needs and those of the territories. This study has yet to be carried out.

Another dimension concerns people with mental illness who are "doubly discriminated against" when it comes to accessing the labour market and for whom there is no response of any kind:

"There are also people here who have a mental illness and who will never go into employment, but there is no other kind of insertion response for them. If they were looked after, they might be able to find work, but there is no support for people with mental illness who live alone - they don't need to be institutionalised - but have nothing to do. These people will always depend on the measure because they have no income, but they have no other answer. They stay on the measure for €10/€15 because they have the SBI measure - Social Benefit for Inclusion - which can be accumulated... It's not employment that is the way out for these people. It's something else that doesn't exist. Then they say: people don't work. But who are they? Who are these people? This is not a homogenous group."

(SII technicians)

"My lack of job opportunities is also a form of discrimination"⁴⁰

(LCC member)

"We have to be realistic because there will always be a fringe of the population who, for one reason or another, won't have that possibility, won't be able to fit in. They will always be stuck with a measure." But for whom there is no appropriate insertion response, only a benefit. "We also have a vacuum in terms of responses to give to people who are unemployable and who are left in a void of activities."

(SII technician)

Another factor is the inadequacy of active employment measures and labour precariousness. Whether due to lack of qualifications, age, illness (particularly mental illness), lack of support in the household or discrimination, SII beneficiaries are often pushed into precarious jobs and/or employment measures that don't always guarantee them proper inclusion in the labour market:

"Is the measure appropriate or not? The SII benefits the family, yes, but in terms of adequacy it falls far short. The measures we have for integration are very temporary. They are situations of employment contracts (CEI)⁴¹ that are short, in that period of time, and that don't respond. What you receive is substantially more

⁴⁰ Testimony from an SII beneficiary with a mental illness, who has been on a placement contract for several years without ever being given a permanent contract.

⁴¹ The CEI+ - Employment-Insertion Contract + measure is aimed at beneficiaries of the social insertion income and other registered unemployed people not receiving social benefits (in, <https://iefponline.iefp.pt/IEFP/eForms/medidasEmpregoInsercao2mais.jsp>).

It is considered socially necessary work and the support given includes a monthly occupation grant of the Social Support Index (€509.26); transport costs: meal or food allowance for each day of activity and insurance.

than if you were in the measure, but it doesn't really solve what you need it to: employability. I still see it this way: integration is only possible if there is real employability. And the work is lasting over time."

(SII technician)

What happens most of the time is that people stay on these types of CEI+ contracts and don't formalise a more permanent contract. It's clear from contact on the ground that organisations choose to use these contracts as a way of filling their labour shortages, but whether due to lack of investment or internal difficulties, they end up not integrating people and contribute to perpetuating their stay in the measure:

"We also have the institutions that are always waiting for specific programmes to... they place a person and once they know what they're doing, etc, they may not be able to continue because they're waiting for a new programme. There has to be co-responsibility on the part of the institution that has already received a CEI number, so that this is the person who stays. You can't just try one more, one more, endlessly... People also don't like to stay like this all the time. You have to realise that the CEI means not having holidays, not being paid the same as the others, etc. People want more if they do the same job."

(SII technician)

"I do the same job as my colleagues, and they have opportunities to integrate and I don't. I don't have access to holiday pay, insurance, etc. and I do the same thing. It's all very precarious"

(LCC member)

"We also have people who, even though they have limitations, have been working for a long time on the same tasks, which they do well, but they are never given an employment contract. They are doubly discriminated against."

(NLI [Local integration Centre] technician)

Difficulty in accessing services - which in the 2002 forums were mentioned as central to inclusion - continues to be a factor in exclusion. Portugal is a very unequal country from a regional point of view and this hinders access to services and, consequently, labour market integration. This is particularly visible in the country's rural and inland regions. Whether or not you take a job can depend on whether or not you have access to public transport, if you don't have your own car. It may also depend on whether you have access to a crèche (nursery) to leave your children in (something that is particularly serious in single-parent families); the same applies if taking a job means moving to other places where access to housing depends on whether there is housing available or whether you have the money to rent a house, or whether you have access to a health centre or a school. All these elements are taken into account when deciding whether or not to accept a job. In the most remote areas of the country, this is even more painful.

One example pointed out in the reflection was the existing gaps in terms of labour in the area of care. This could be an area for investment, involving the capacity building/training of beneficiaries of this service. However, some of the constraints listed above hinder insertion responses at this level:

"Maybe many of the people on the SII would even be able to work in this area of the IPSS [private social solidarity institutions], but we have the other side, which is that many of these IPSS are in parishes far from the urban centres, with difficulties of access and transport. Because to work in most of these IPSS, you have to work shifts, not from 9am to 5pm, which means that people have their own transport. People on the SII don't have their own transport. Often the IPSS are the only employers in the parishes and there's nothing else. You need

transport to get to work. This is a constraint on getting other people into the IPSS. We have to match demand with supply. We don't know how to overcome this either.

"Apart from transport, the housing situation is a major constraint. Even if people want to move to a village that even has a job offer, they can't because there's no housing. Lack of housing and lack of transport."

"In addition to these shortcomings, there is a lack of other services, etc.: no access to a crèche, no access to health care... (...) Single-parent families find it very difficult to accept shift work. Because they don't have anyone to leave the children with."

(SII technicians)

Finally, discrimination is once again highlighted as a factor that prevents these beneficiaries from accessing the labour market. People are labelled as "not wanting to work", but they are not always given work. If you add to this the fact that they belong to an ethnic group such as the Roma, the situation is even more complicated because discrimination extends not only to the labour market, but also to all other types of services, such as housing:

"There are people who sometimes say they don't want to work. But we say 'look, do you need a domestic worker? Will you take one of these people?' And most of the time the answer we get is no. Something's not right. If they're the ones who don't want to, but there is this opportunity, then it's not that they don't want to. It's the other person's lack of acceptance. There's always this idea that people won't do their job well. But it's not for lack of training either. Because many of these people have undergone training on a regular basis. But often this training isn't appropriate for what people need or will need in order to be employable in the future."

(SII Technician)

The SII is one of the most permeable measures to **social criticism and stigma**. This, in itself, is one of the reasons why people don't use the measure. The situation regarding the coverage and utilisation (take-up/non take-up) of the SII is still little known in Portugal and requires a broad study based on concrete data, but also on the testimonies of those who receive the benefit and those who implement the measure. In the case of the SII, data is collected on the number of beneficiaries/families, but there is no comparative database of the Portuguese population that would allow us to understand whether the measure is reaching all potential beneficiaries. This study, and even the existence of mechanisms to monitor the measure, are extremely important, particularly at a time when the aim is to improve the measure, or to promote a single social benefit as the previous government announced. Associated with this is also the complexity of the measure, as has been mentioned, and even the lack of knowledge that still exists about it. In 2009, Carlos Farinha Rodrigues said that the non-take-up rate in Portugal in 2006 could be as high as 35 %. At the moment and with the various changes the measure has undergone, this percentage could be higher or lower.

The lack of awareness and the difficulty of continuous monitoring of this measure, as well as all the stereotypes associated with it, have been obstacles to its evolution and to its greater effectiveness and efficiency in the fight against poverty.

We believe that this measure could be complemented by a number of changes, including: strengthening the teams to promote closer monitoring and attention to the complexity of the problems faced by individuals and families; training the teams; periodic - participatory - evaluations of the measure; reviewing the value of the benefit and adjusting it to the beneficiaries' profiles; reducing the bureaucratic burden; revision of the access criteria in order to promote greater

coverage of the measure; evaluation of the process of transferring competences to local authorities in this area, with transparent criteria and indicators (quantitative and qualitative); promotion of greater public awareness, giving a voice to the people who benefit from the measure itself⁴². At this level, we would also emphasise the importance of understanding the long-term impact of the measures on people's lives. The realisation of barometers to monitor and evaluate these realities would be fundamental.

New developments in minimum benefits

The **European Pillar of Social Rights, and its action plan** presented in 2021, has brought greater attention to the issue of minimum income. Not only is the reference to "appropriate minimum income" one of the principles of the Pillar (principle 14), but the Commission has also committed to presenting a new Recommendation on this issue.

The ***Council Recommendation on adequate minimum income ensuring active inclusion*** was presented in September 2022 and adopted in January 2023 and aims to "fight against poverty and social exclusion by promoting appropriate income support, in particular minimum income, effective access to enabling and essential services for those who lack sufficient resources and promoting the integration into the labour market of those who can work, in line with the active inclusion approach."⁴³

The fact that it is a recommendation makes the matter lighter for the member states because the level of their commitment is not binding. In any case, the Commission undertakes to monitor the implementation of the Recommendation and member states must report on it. At national level, there is no information on the adoption of the Recommendation and whether any steps are being taken to understand the state of the art.

The Pillar also influenced the design of a **National Strategy to Fight Against Poverty 2021-2030**⁴⁴, with national targets to be met by 2030, namely in terms of poverty reduction (reduction of 660.000 people and 170.000 children in poverty). With regard to the Social Integration Income, the Strategy aims to "Re-evaluate and improve the Social Integration Income, in order to ensure its centrality within the framework of social policies to fight against poverty, increasing its scope, effectiveness and efficiency". It's also worth mentioning the Solidarity Supplement for the Elderly, since in this case the SSE reference value is expected to converge with the poverty threshold⁴⁵, a goal that was achieved this year.

⁴² See: EAPN Portugal, *Análise à recomendação do conselho europeu sobre Rendimento Mínimo Adequado para assegurar uma inclusão ativa* (Analysis of the European Council Recommendation on Adequate Minimum Income to ensure active inclusion). In Analysis no. 40, March 2023. Available at: <https://www.eapn.pt/wp-content/uploads/2023/03/Em-analise-no40-EAPN-Portugal.pdf>

⁴³ Available at: <https://ec.europa.eu/social/main.jsp?langId=en&catId=89&furtherNews=yes&newsId=10504>

⁴⁴ Council of Ministers Resolution no. 184/2021 of 29 December 2021. Available at: <https://diariodarepublica.pt/dr/detalhe/resolucao-conselho-ministros/184-2021-176714553>

⁴⁵ Ordinance no. 31-A/2023 of 19 January 2023. Available at: https://www.seg-social.pt/documents/10152/19842463/Portaria_31_A_2023.pdf/8b0f8da3-65f5-4a80-b0e1-a2df7bb59406

As mentioned earlier, the government's plan is to converge the value with the poverty threshold.

The strategy's action plan was presented in October 2023⁴⁶, indicating 3 activities to fulfil the objective:

- Carry out an evaluation study of the Social Integration Income
- Strengthen the SII by resuming the process of convergence with the social pension
- Creating the single social benefit

According to the plan, the evaluation study was finalised in 2022, but we don't have access to it. In one of the⁴⁷ moments for monitoring the Strategy's action plan, it is stated that Portugal submitted a form on this measure that was part of the 2022 report by the Commission and the Social Protection Committee on minimum income⁴⁸. Portugal is now in the process of updating the form on the basis of the Commission's recommendation, but we don't know what procedures are being carried out in this regard.

The 2022 factsheet also mentions, in the context of reform objectives and trends, that "in 2021, a transversal competence centre for planning, policy and foresight in public administration (PlanAPP) was created; it is intended to bring together planning, design and innovation competences, for ex ante and ex post impact assessment, and for monitoring and reviewing public policies". A structure that could play an important role in monitoring and improving measures of this nature.

In the case of the second activity, the updating of the Social Support Index made it possible to increase the reference value of the SII in 2024 to €237.25. The old-age social pension (another minimum guarantee measure) is €245.79, plus the Extraordinary Solidarity Supplement⁴⁹, which varies according to age (<70>). According to the action plan, this convergence implies legislative changes and is scheduled for 2024/2025.

With regard to the third activity, the previous government initiated a study, promoted by the OECD and financed by the European Commission (*Technical Support Instrument*) to support a reform towards the definition of a single social benefit. The study aims to:

- Inform and guide the development of a single social safety net at national level;
- Strengthen the adequacy and scope of social safety nets and reduce complexity;
- Reduce the risk of poverty among beneficiaries (thus contributing to the poverty reduction target set out in the National Strategy).

The study is underway and initially organised consultation and debate with civil society organisations⁵⁰, public bodies and experts. However, with the change of government, we don't know if the study, once finalised, will be used to promote this reform.

It should also be emphasised that the National Strategy reinforces the role of the process of transferring competences to local authorities in the field of social action, including it in a strategic objective aimed at reducing the factors of greatest vulnerability, which are enhanced by territorial characteristics.

⁴⁶ Council of Ministers Resolution no. 126/2023 of 17 October 2023. Available at: <https://diariodarepublica.pt/dr/analise-juridica/resolucao-conselho-ministros/126-2023-222877162>

⁴⁷ EAPN Portugal is part of the Consultative Forum of the National Strategy to Fight Against Poverty 2021-2030.

⁴⁸ Social Protection Committee; European Commission, *The 2022 Minimum Income Report. Vol. I and Vol. II*, september 2022. Available at: <https://ec.europa.eu/social/main.jsp?catId=89&furtherNews=yes&newsId=10438&langId=en>

⁴⁹ See: <https://www.seg-social.pt/pensao-social-de-velhice1>

⁵⁰ EAPN Portugal was one of the organisations involved.

With regard to this process of transferring powers/competences to local authorities in the field of social action (the SII was one of the measures that underwent this change), EAPN Portugal tried to analyse the implications of this transfer at two different times: in 2022 and now in 2024. It is clear that this change in the application of this specific measure has had repercussions on the way institutions operate, particularly local authorities and IPSSs, but also on the relationship between the beneficiaries of the measure and the teams. The effectiveness of the measure depends to a large extent on the way the teams work in the field and this process of transferring competences shows that the process is not all the same throughout the country. This is a recent process that needs to be monitored and it is important that the Social Security Institute is able to listen to all the interested parties: local authorities, third sector organisations and beneficiaries.

Other measures have been implemented that aim to address the income of the most vulnerable people, particularly children. The **Child Guarantee**, also promoted by the Pillar, and the updating of the family allowance are examples of this. The report on the State of the Nation and Public Policies⁵¹ states that both the Child Guarantee and the revalorisation of the family allowance for low-income families "if they are not revised to cover families with incomes close to the poverty line (€13,878 per year in 2022 for a family with 2 adults and 2 children under 14) and complemented by others that raise the incomes of families in poverty, will not have a sufficient impact to achieve the child poverty reduction targets set"⁵². A reminder that also applies to other measures such as the SII.

In the report available on the website of the Child Guarantee dated March 2024 we can read: "the PAGPI⁵³ 2022-2030 brings together and articulates an integrated framework of public policies with the aim of fighting against poverty and the social exclusion of children and young people and ensures the progressive realisation of the European Recommendation, guaranteeing access for children and young people experiencing poverty to a range of essential services."⁵⁴

According to the Social Security Practical Guide, the Child Guarantee is: "A cash support paid monthly, which complements the family allowance for children and young people in order to guarantee the payment of a total value of 122€ (including the amount of the family allowance)." The amount to be received corresponds to the difference between the amount of the family allowance for children and young people and the monthly amount of the guarantee for children, in order to guarantee the payment of a total amount of €122.⁵⁵

The implementation of the Child Guarantee implies the need for intersectoral coordination, which is why a strong link is planned with the local social network programme, and several Local Child Guarantee Centres have been set up at county level.

⁵¹ Ricardo Paes Mamede (Coord.), *The State of the Nation and Public Policies 2023: Structural Reforms*, July 2023. Available at: https://www.iscte-iul.pt/assets/files/2023/07/19/1689768777356_WEB_2_IPPS_2023.pdf

⁵² Paulo Pedroso, "Proteção Social" ("Social Protection"), in Ricardo Paes Mamede, *Op. Cit.*, July 2023, p.48

⁵³ It means the action plan.

⁵⁴ Child Guarantee. *Relatório Intercalar (Interim Report)*, March 2024, p.3. Available at: <https://www.garantiainfancia.gov.pt/documents/37502/40577/Relat%C3%B3rio+Intercalar+2024/d2c2eec7-3840-43a2-8fd3-25b0a2b84c79>

⁵⁵ Department of Communication and Contributions, *Guia Prático da Garantia para a Infância (Practical Guide to the Child Guarantee)*, Institute of Social Security, I.P., 1 January 2024. Available at: <https://www.seg-social.pt/documents/10152/19882026/4004%20-%20Garantia%20para%20a%20infancia/6126c563-7fcc-4695-a0f2-0b5af03c113d>

However, given the targets set for reducing child poverty by 2030, and bearing in mind the latest data made available by Eurostat⁵⁶, the number of children at risk of monetary poverty was 347,000 (2023 survey), 44.000 more than in the previous survey and 26.000 more than in the 2019 survey. There was a reduction between 2021 and 2022, when the lowest number of children at risk of poverty was reached, and a large increase in 2023, which implies a regression to values higher than the 2018 survey. This situation leads us to question whether the targets set will actually be met!

⁵⁶ Eurostat, *At risk of poverty rate slightly decreasing in 2023*. News articles, 19 June 2024. Available at: <https://ec.europa.eu/eurostat/en/web/products-eurostat-news/w/ddn-20240619-1>

What changes are needed? Concluding remarks

It is indisputable that social transfers have a significant impact on reducing the at-risk-of-poverty rate, which in 2022 was 17.0 %. Before any social transfer, the at-risk-of-poverty rate would have been 41.8 %. That percentage drops to 21.2 % after pension-related transfers. However, social transfers related to sickness and disability, family, unemployment and social inclusion have, in the latest available data, contributed less to reducing the risk of poverty (4.2 p.p.)⁵⁷. In other words, measures such as the SII, analysed here, are still far from efficient in the fight against poverty.

EAPN Portugal has stated many times that measures such as minimum income must be appropriate, accessible and empowering: "a means of empowering people's social participation, as well as a basis for accessing sustainable, quality jobs. Appropriate income schemes must be coupled with accessible, quality services."⁵⁸ It's about improving the level of adequacy, bringing it closer to the poverty line and taking into account the cost of living, but also about guaranteeing the effective conditions for full and dignified inclusion, which goes beyond economic status.

There are, as noted above, structural aspects inherent in the measures of the non-contributory system, such as the SII, which need to be clearly identified, analysed and reviewed.

But changes must also happen from a more global point of view. First and foremost, we need to make poverty and the fight against poverty a national goal and realise that improving these measures is an investment, not an expense. Investing in promoting people's dignity means investing in society as a whole. The truth is that investment in these areas still falls short of what is needed: according to Eurostat data⁵⁹, 0.2% of GDP is the proportion of Portuguese state spending on social protection measures in the area of social exclusion in 2021. Portugal is 8th in the EU27 with the lowest proportion of expenditure on this type of social protection measure. For the EU27 as a whole, the proportion of expenditure on social protection measures in the area of social exclusion is 0.7%.

There is also a lot of work to be done in terms of raising awareness of the issue of poverty and the real situations in which people live when they are in poverty. Some of the testimonies above are examples of this. They reveal not only the stereotypes that society has about these measures and their beneficiaries, but also the stereotypical views that are inherent in measures of this nature. The value of the SII is so low because there is an "implicit" fear that by being higher people won't want to work. However, the truth is that inadequate minimum income schemes also trap people in the measure, in other words, the implicit fear becomes real, but the reasons for this situation are not in the people who benefit from the measure, but in the way it is thought out and designed.

Another aspect to consider is the multiplicity of benefits that exist in Portugal, which makes the system itself complex and cumbersome to manage. But this multiplicity is linked to the lack of an

⁵⁷ See: INE, *Rendimento e Condições de Vida 2023 (Income and Living Conditions 2023)*, 27 November 2023. Available at: https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=594931817&DESTAQUESmo_do=2

⁵⁸ Cátia Santos; Diogo Mazon et al, *Diálogos sobre Pobreza: Atas do Congresso (Dialogues on Poverty: Proceedings of the Congress)*, Porto, EAPN Portugal, 2022, p. 20. Available at: https://reapn-my.sharepoint.com/personal/comunicacao_eapn_pt/_layouts/15/onedrive.aspx?id=%2Fpersonal%2Fcomunicacao%5Feapn%5Fpt%2FDocuments%2FEAPN%20Portugal%20Livro%20do%20Congresso%202022%2Epdf&parent=%2Fpersonal%2Fcomunicacao%5Feapn%5Fpt%2FDocuments&ga=1

⁵⁹ Eurostat, Social Protection (ESSPROS)

integrated vision of the fight against poverty, the lack of attention to its causes, and the different political visions of the phenomenon and how to fight it. "The fight against poverty is too important to be dependent on party political choices"⁶⁰, but what we have seen over the years is exactly the opposite, both at national and European level.

Diagnosing poverty remains a complicated task. Poverty data is still out of date and this has an impact on setting targets. Take the targets of the National Strategy to Fight Against Poverty, which refer to 2019 figures and which, if not rectified, will not take into account the worsening of people's living conditions in recent years. Policies are being defined with the same problem and without monitoring and evaluation processes. Civil society participation is defended, but participatory processes are not continuous and structured over time and have little (or no) impact on policy revision.

Without preventive measures and measures that address the causes of poverty, the numbers of people in this situation remain little changed over time. In times of crisis, people in poverty end up being penalised more because the conditions are not created to withstand these situations.

Finally, there's a symbolic change that needs to be made, which has to do with the very concept of minimums. Portugal changed the name of the Guaranteed Minimum Income measure to Social Integration Income. As has been mentioned, this change had other reasons, but the concept of minimum remains, as we are dealing with the national minimum income scheme and the European Recommendation itself aims to promote an appropriate minimum income. The concept of appropriate is important, but it is ambiguous in its meaning and calculation. By seeking to guarantee minimums, it will never be possible to break cycles of poverty. The shift should be towards dignity, because the aim of fighting against poverty should be to promote a dignified life and the dignification of the person to the full - a principle that should underpin all measures aimed at fighting against poverty.

⁶⁰ Cátia Santos; Digo Mazon et al, *Op. Cit.*, Porto, EAPN Portugal, 2022, p. 149. Available at: https://reapn-my.sharepoint.com/personal/comunicacao_eapn_pt/_layouts/15/onedrive.aspx?id=%2Fpersonal%2Fcomunicacao%5Feapn%5Fpt%2FDocuments%2FEAPN%20Portugal%20Livro%20do%20Congresso%202022%2Epdf&parent=%2Fpersonal%2Fcomunicacao%5Feapn%5Fpt%2FDocuments&ga=1

Recommendations

- Human beings need to be at the centre of decisions. Decisions that are made in areas that are central to their lives and that are not only economic, but social and, above all, human. Economic concerns are increasingly the ones that drive countries, the ones at the forefront of the decision-making process, but although they are important, they don't always reflect a social concern and this has a considerable human impact, the most dramatic expression of which is poverty. It is necessary to develop a new paradigm that focuses first and foremost on the integral development of the human being.
- The action plan for the European Pillar of Social Rights will be evaluated in 2025 and in the context of a new Commission whose president has emphasised the need to define a European Strategy to Combat Poverty. Improving social protection systems and minimum income schemes must be one of the objectives of this Strategy. It is essential to ensure greater political, social and financial investment to improve these measures, making them effective in the fight against poverty.
- It is important to invest in raising public awareness about poverty, what it means to live in poverty and how to fight against the phenomenon. Poverty is multidimensional and requires an integrated response at various levels, also involving the whole of society and its players. At the moment, there is a narrative of blaming people for being in poverty and stereotypes that devalue them and jeopardise access to their rights. We need to promote a narrative of inclusion that involves all the actors, from the media to organisations and professionals and the political decision-makers themselves.
- The participation of people living in poverty is a strategic principle in the fight against poverty and should be adopted as a working methodology. This means that people's participation should be guaranteed from the moment policies are defined, through to their monitoring, implementation and evaluation.
- It would be essential to create a national forum made up of people experiencing poverty who could monitor and evaluate the measures aimed at them. This forum could also be called upon to integrate national commissions and/or platforms that exist in thematic areas central to people's lives.
- *Poverty proofing* mechanisms need to be created in the Portuguese legislative system. Political actors need to be sensitised to the importance of the goal of fighting poverty and a mechanism needs to be legislated to allow new public policy measures to be evaluated taking into account their impact (positive, negative or nil) on the fight against poverty.
- The Social Integration Income measure must be evaluated in a participatory way by those who implement it and those who receive it. It is essential to clearly identify the measure's shortcomings and put forward proposals for improvement. This evaluation is central if a Single Social Benefit is created that will also absorb the SII.
- The process of transferring competences to local authorities in the field of social action needs to be monitored and evaluated. It is essential that this evaluation is participatory, involving all stakeholders: local authorities, third sector organisations and beneficiaries.

- Low wages and precarious labour are among the structural causes of poverty, which, along with others such as low social benefits and lack of access to quality services, "trap" people in vicious cycles of poverty for long periods of time. Any investment in improving measures such as the SII must be accompanied by other investments in dimensions that are essential to the inclusion of people who are in a situation of vulnerability.
- It is essential to create roadmaps at local level with the aim of defining localised anti-poverty strategies that can diagnose the problems in that area and outline intervention plans to resolve them.

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