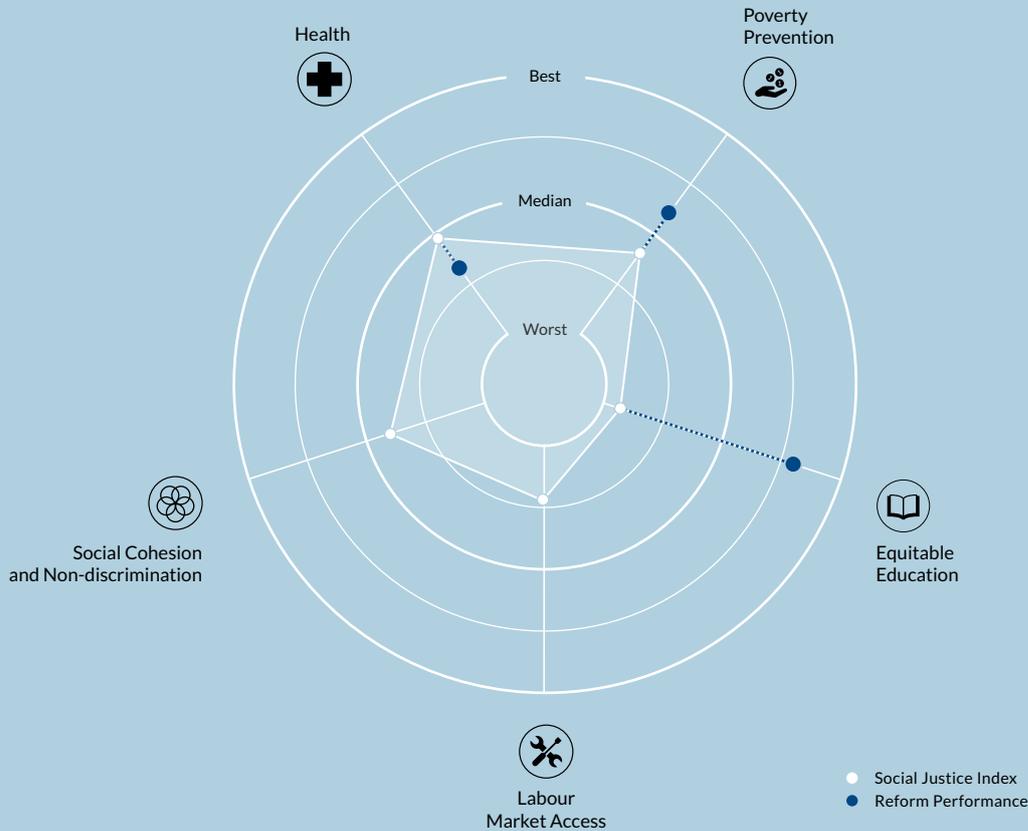


## Findings by Country



# Portugal

How does the country rank in the EU?



## Overall Findings

**Need** Portugal performed poorly in the 2015 Social Justice Index (SJI), ranking in the bottom half on all dimensions and even in the bottom five on Equitable Education. The country only scored 4.98 out of 10, which is clearly below the EU average (5.63). However, based on the experts' assessment, Portugal's need to reform is close to the EU median need of 2.18, ranking the country 13th out of 23 EU member states. With regards to Equitable Education, Portugal even ranked in the top 10 (1.93, rank 9/22). In contrast, the experts assessed the need to prevent poverty as the second highest out of 27 EU member states. This assessment is at variance with the SJI, which ranked Portugal 17th out of 28 countries in the dimension of Poverty Prevention.

**Activity** The activity rate of 42 percent is again close to the EU median (46%), ranking Portugal 16th out of 23 assessed countries. The rate is higher with regards to health (54%, rank 13/20) and unemployment (45%, rank 15/22), especially regarding reforms targeting unemployment within the total pop-

### Overall Reform Performance Ranking



### Overview of Reform Barometer Scores



ulation and young people (75% each). Fewer policies have been introduced to improve Equitable Education (35%, rank 11/22) and to alleviate Poverty (38%, rank 12/27), with the exception of one programme targeting children (62%) and senior citizens (60%).

**Quality** The quality of newly introduced reforms is equal to the EU median (0.70), ranking the country 10th out of 20 EU member states. The score is even higher for poverty prevention (0.81, rank 12/24) and designing Equitable Education (1.26, rank 2/21). In contrast, the quality score regarding Health is significantly lower (0.31), ranking the country 15th out of 19.

#### Dimension Findings



#### Poverty Prevention

**Need** The 2015 SJI highlighted Poverty Prevention as one of the major policy challenges for Portugal, referring to an increased proportion of the population being at risk of poverty or social exclusion as well as to a widening

gap in poverty levels between generations. In fact, the report pointed out that child poverty had increased between 2007 and 2015, while poverty among the elderly had decreased. These findings are also reflected in the experts' assessment, which puts the need to alleviate poverty for the total population at 2.42, ranking the country second to last. Only Bulgaria has a slightly higher need for reform (2.44). Likewise, while the need to alleviate poverty for elderly people is equal to the overall need in this dimension (2.42), the need for initiatives targeting child poverty is significantly higher (2.68). The second-most-at-risk group is single parents (2.63). With regards to the foreign-born population, the need for reforms was assessed at 2.42. However, one expert commented that more data is needed in order to properly assess the need, stating: "We need a comprehensive study of the economic well-being of migrants (first and second generation) in Portugal. The Statistics Office is forbidden by law to produce data disaggregated by ethnicity."<sup>1</sup>

**Activity** Portugal's activity rate of 38 percent for the dimension of Poverty Prevention is equal to the EU median. While the rate was much lower for the foreign-born population (5%), refugees (26%) and single parents (25%), more policies targeting the total population (50%), children (62%) and senior citizens (60%) have been introduced. One expert describes how government activity changed after the 2008 financial crisis, writing: "A severe austerity regime, including cuts in welfare programmes and tax increases, was introduced in 2011, and it reinforced the negative impact of the crisis on vulnerable families. In the period from July 2014 to January 2016, there have been no policy reforms, except emergency programmes, but a new government (since 26 November 2015) has announced a strategy for combatting poverty based on three axes: First, draw up a national anti-poverty strategy for children and young people in an integrated way, reinstating [a] family allowance as the reference state support for families. Secondly, restore the previous level of social benefits, which guaranteed a minimum social standard for people subject to vulnerability (such as a 'Social Insertion Income and Income Supplement for the Elderly'). Finally, dignify work, creating new public support for low-wage [earners], and prevent working families with children from living in poverty."<sup>2</sup>

**Quality** The quality of recent reforms is assessed at 0.81, ranking Portugal 12th out of 24 EU member states. While the experts evaluated policies targeting the total population as practically ineffective (0.15), they are more optimistic about a positive impact of programmes targeting poverty among children (1.15), single parents (1.00) and the elderly (0.80). One expert voiced the criticism that "social emergency policies (such as food for poor people) didn't reduce poverty levels, [but] only alleviated stress for most severe forms of poverty. More structural policies are needed to enable families to become less dependent."<sup>3</sup>

<sup>1</sup> Amílcar Moreira, Institute of Social Sciences, University of Lisbon

<sup>2</sup> Pedro Hespanha, Centre for Social Studies, University of Coimbra

<sup>3</sup> Pedro Hespanha, Centre for Social Studies, University of Coimbra

## Equitable Education

**Need** Portugal performed poorly in the dimension of Equitable Education in the 2015 SJI, ranking third to last, ahead of only Malta and Slovakia. However, the experts are less pessimistic about the Portuguese education system. Based on their assessment, the need to reform is 1.93, ranking the country 9th out of 22 EU member states assessed. Like most European countries, Portugal has a high need to ensure the independence of learning success from a person's socioeconomic background (2.33, rank 7/25) and to reduce the rate of early school leavers (2.00, rank 10/21). A comparatively low need to reform was assessed with regards to the integration of refugees (1.80, rank 6/18), the quality of teaching (1.67, rank 8/22) and the structural conditions regarding financial and human resources in education (1.81, rank 7/23). However, it has to be pointed out that, on the policy objectives of structural conditions and quality of teaching, the need was assessed as being significantly higher for early education and lifelong learning than for other educational levels. For example, as the need to improve the quality of teaching in pre-primary through tertiary education was assessed as ranging between 1.40 and 1.60, the need with regards to early education (2.00) and lifelong learning (2.17) was assessed as being significantly higher.

While Portugal ranks in the top 10 on five policy objectives, the country performs worse with regards to equal opportunities in education. The need to reform was assessed at 1.98, ranking the country 12th out of 25. Though the need is assessed as being very low for primary education (1.00), it is significantly higher for tertiary education (2.40), lifelong learning (2.40) and early education (2.30) – or, in short, for most non-mandatory levels. Several experts also stressed in their written comments that universal early education should be introduced to foster equal opportunities for children.

**Activity** The highest activity rate in this dimension is discerned for the integration of refugees (60%), ranking the country 3rd out of 18 countries assessed. Much has also been done to reduce the number of early school leavers (41%) and to increase equal opportunities in education (43%), especially with regards to pre-primary education (70%). Less has been done to decrease the dependence of learning success from a person's socioeconomic background (29%, rank 10/21), to improve structural conditions in education (21%, rank 13/23) and to improve the quality of teaching (13%, rank 16/22).

**Quality** The overall quality of newly introduced policies is assessed at 1.26, ranking the country 2nd out of 21 EU member states.

## Health

**Need** The need to reform the health system is assessed at 2.24, ranking the country 10th out of 20 countries. Though the policy objective of health governance received a moderate need score (2.25, rank 9/19), one expert highlights its importance for overall improvement in this dimension, stating: “This is probably one of the major problems and the potential solution of many of the actual problems in the field of health. Probably the qualification of primary care namely in the eyes of the public, and a clear articulation between primary care and hospitals will be relevant.”<sup>4</sup>

<sup>4</sup> Constança Paúl, Abel Salazar Biomedical Sciences Institute, University of Porto

**Activity** The activity rate for the dimension of Health is 54 percent, ranking Portugal 13th out of 20 countries. However, the rate with regards to sustainable and fair financing of the health system (76%) and its outcome performance (82%) is the fourth highest.

**Quality** The experts assess the quality of newly introduced policies at 0.31 (rank 15/19). While initiatives addressing the need to reform the efficiency as well as the sustainable and fair financing of health system are expected to be practicably ineffective (0.11 and -0.07, respectively), a positive impact is anticipated with regards to the improvement of health care (1.10, rank 3/19). One expert comments on the effects of reforms, stating: “Comprehensive policy reforms agreed with the so-called troika were taken after 2011 (among which: decrease the burden on public expenditure; monitor and assess professionals’ performance, namely regarding drugs prescription; merge facilities and so on. Little has been known until today regarding the real effects of this policy change. The macro-level indicators (e.g. [the] population’s health outcomes) have not captured significant changes besides the exponential rise of users’ out-of-pocket payments (from about 25% in 2007 to more than 33% in 2012). On the other hand, I was responsible for a national-scale study conducted among doctors and designed to grasp their real experiences before/during the time the bailout lasted in Portugal. The results are expressive: more than half of the doctors (53.3%) claim that more patients are abandoning treatments.”<sup>5</sup>

<sup>5</sup> Tiago Correia, ISCTE - Lisbon University Institute