

COUNTRY NOTE

Database on Social Expenditure (www.oecd.org/social/expenditure.htm)

OECD - Social Policy Division - Directorate of Employment, Labour and Social Affairs

PORTUGAL

Nomenclature

CGA	General retirement funds
IEFP	Institute for employment and vocational training
IGFSS	Institute for financial management of the social security

Monetary unit

Social spending is expressed in millions of Euros (EUR).

General notes

The Ministry of Labour and Solidarity supervises the operation of the Portuguese system of social protection. The general scheme for employees and self employed workers does not cover civil servants or lawyers and barristers who are covered by special schemes.

The general scheme is administered by the five regional social security centres, responsible for sickness (cash benefits), maternity, unemployment, family benefits and the non-contributory scheme; National Pensions Centre in charge protection coverage in the event of invalidity, old-age and death; National Centre for the Protection against Occupational Risks in charge of protection coverage in the event of an occupational disease.

The individual country notes of the OECD Benefits and Wages (www.oecd.org/social/benefits-and-wages.htm) provide a comprehensive description of characteristics of social programmes (e.g. conditions for receipt, calculation of payment rates, tax treatment of social support, benefit duration, etc.) for the working-age population, including: unemployment insurance and assistance, social assistance, employment-conditional benefits, housing benefits, family benefits, childcare support, and support for sole parent households.

Break in series:

Data for 1990 onwards are based on the new ESSPROS methodology format. Coherent spending series for 1980 onwards at the individual programme level were obtained on basis of information for a few years in the early 1990s for which both historical spending series and information based on the new ESSPROS format were available. For certain programmes and aggregate categories, breaks in series (between 1989 and 1990) were inevitable. In general, programmes from the old ESSPROS format which could not be matched with a figure from the new ESSPROS format were set to “missing” from 1990 onwards; similarly, figures from the new ESSPROS format which could not be matched to a programme from the old methodology were set to “missing” for the period 1980-89.

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Data for Private health insurance before 2000 refer the total health spending function (HC1-HC9, HCR1) as the split in current health spending (HC1-HC9) into the financing schemes is only available from 2000 on.

Secretariat estimates:

The split between public and private social expenditures is not available since 2010. These were estimated by using the 2009 proportion of public and private social expenditures in total social expenditures.

Sources

1980 onwards

Data provided by EUROSTAT (ESSPROS database), except for:

1980 onwards 4. Health: OECD Health Statistics (www.oecd.org/health/healthdata)

1998 onwards 5.2.1.10 Childcare (pre-primary education): OECD Education database (www.oecd.org/edu/database.htm)

1986 onwards 6. ALMP: OECD Labour Market Policy database.

(See Table “Passage from ESSPROS to SOCX” next page).

Background information

European Social Statistics, Social Protection, ESSPROS qualitative information

http://epp.eurostat.ec.europa.eu/portal/page/portal/social_protection/data/qualitative_information

MISSOC, Mutual information system on social protection in the Member states of the European Union and of the European Economic Area

(<http://ec.europa.eu/social/main.jsp?catId=815&langId=en>)

IGFSS, Social Security Account.

Instituto Nacional de Estadística.

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Passage from Esspros to SOCX (public / mandatory-voluntary private)

Portugal, in millions Euro

ESSPROS/SOCX		Code	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013			
(1)	ESSPROS	Social protection benefits	1100000	7,468	9,090	10,928	12,898	14,618	16,339	16,557	17,722	19,657	21,533	23,729	25,781	29,363	30,928	33,161	35,663	37,375	38,603	39,917	43,253	43,828	42,709	42,007	44,377		
-	(2)	- ESSPROS	Disability	Economic integration of the handicapped	1121114	1	1	1	1	2	2	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
-	(3)	- ESSPROS	Sickness	Benefits in kind	1111200	2,404	2,821	3,372	4,096	4,804	5,499	4,803	5,193	5,873	6,612	7,083	7,577	8,569	8,397	9,451	10,030	10,168	10,237	10,563	11,666	11,509	10,128	9,970	10,050
					1112200	0	7	8	9	9	11	11	11	10	10	10	11	9	7	7	1	1	3	3	3	3	0	0	
-	(4)	- ESSPROS	Unemployment	Cash - Vocational training allowance	1161114	31	27	21	27	30	26	33	22	27	41	54	49	47	159	192	222	187	150	131	149	166	152	171	215
					1162114	0	0	0	1	1	1	0	0	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	
					1161200	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	3	2	2	3	5	4	4	5	
					1162200	0	0	0	0	0	1	2	1	1	1	1	1	3	4	0	0	0	0	0	0	0	0	0	
+	(5)	SOCX/ Health	HEALTH	Public benefits in kind	620.10.4.0.0.0	2,004	2,412	2,628	3,054	3,295	3,940	4,506	4,887	5,428	6,062	7,638	8,149	8,916	9,289	10,114	10,733	10,574	11,003	11,511	12,189	12,345	11,330	10,334	10,306
+	(6)	SOCX / EDU-EAGFAMILY	Service/Child care (pre-primary education)	620.10.5.2.1.9	m	m	m	m	m	m	m	m	231	310	344	397	438	546	561	588	594	604	629	657	695	654	634	624	
+	(7)	SOCX/ ALMP	ACTIVE LABOUR MARKET PROGRAMMES	620.10.6.0.0.0	257	320	415	445	391	424	478	498	601	698	784	884	869	920	984	1,031	947	866	955	1,304	1,201	1,014	829	848	
-	(8)	= SOCX	MANDATORY PRIVATE SOCIAL EXPENDITURE	620.20.90.0.0.0	123	118	137	183	302	290	312	340	382	369	502	539	578	575	551	560	617	611	616	496	494	493	426	470	
		ESSPROS	Disability	Acidentes Trabalho (Companhias d	1121111	123	118	137	183	302	290	312	340	382	369	502	539	578	575	551	560	617	611	616	496	494	493	426	470
-	(9)	= SOCX	VOLUNTARY PRIVATE SOCIAL EXPENDITURE	620.30.90.0.0.0	350	456	518	626	659	701	758	832	1,086	1,242	1,444	1,657	1,874	1,946	2,271	2,446	2,562	2,627	2,744	2,757	2,672	2,845	2,754	2,818	
		ESSPROS	Bancos	1101110	47	70	70	79	54	30	16	10	12	8	8	0	11	12	14	0	0	0	0	0	0	0	0	0	
		ESSPROS	"Serviços de Assistência Médico-S	1101110	0	0	1	1	1	2	2	2	2	3	3	3	3	1	3	3	3	3	3	0	0	0	0	0	
		ESSPROS	Associações Socorros Mútuos	1101110	2	3	4	5	9	11	17	21	23	31	40	0	58	66	100	117	146	221	253	202	0	0	0	0	
		ESSPROS	Prestações directas da entidade p	1101110	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	414	390	293	272	264	0	0	0	0	
		ESSPROS	Santa Casa da Misericórdia de Lis	1101110	0	23	31	34	33	34	35	38	40	41	44	44	48	49	46	47	51	56	62	0	0	0	0	0	
		ESSPROS	Instituições Particulares de Solidar	1101110	136	170	198	274	311	366	373	395	463	570	691	893	982	1,028	1,136	1,211	1,267	1,318	1,368	1,431	0	0	0	0	
		ESSPROS	Cruz Vermelha Portuguesa	1101110	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	
		ESSPROS	Redução de tarifas (Rodovia de L	1101110	140	152	158	165	172	172	215	250	342	297	280	46	335	213	289	1	2	2	2	2	2	2,006	1,992	1,962	2,088
		ESSPROS	Associação dos Deficientes das F	1101110	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
+	(10)	SOCX/ Health	HEALTH	Voluntary private insurance, benefits in ki	620.30.4.2.0.0	25	36	54	67	79	87	102	120	207	294	381	425	476	621	706	671	728	750	799	799	830	842	832	823
=	(11)	= SOCX	PUBLIC SOCIAL EXPENDITURE	620.10.90.0.0.0	6,843	8,427	9,967	11,522	12,577	14,260	15,658	16,824	18,745	20,622	23,782	25,801	28,982	31,217	33,050	35,426	36,680	38,197	39,753	43,128	44,051	42,923	41,303	43,413	

Notes:

- (1) "ESSPROS / Social protection benefits" are Total ESSPROS expenditures (1000000) less Administration costs (1200000) and other expenditure (1400000, property income and other).
- (2) The ESSPROS data within "Disability / Economic integration of the handicapped" are not included in SOCX database to avoid double counting with SOCX "Active Labour Market Programmes / Measures for the disabled".
- (3) The ESSPROS data within "Sickness / Benefits in kind" are not included in SOCX database to avoid double counting with SOCX "Health / Benefits in kind".
- (4) The ESSPROS data within "Unemployment / Cash Vocational training allowance" "Unemployment / Benefits in kind" are not included in SOCX database to avoid any double counting with SOCX "Active Labour Market Programmes".
- (5) SOCX Health benefits in kind are from "OECD Health Data (www.oecd.org/health/healthdata)".
- (6) SOCX includes public spending on pre-primary education from OECD education database, unless such data are already included in "5.2.1. Day care services".
- (7) SOCX Active Labour Market Programmes are from "OECD database on labour market programmes".
- (8) Spending on some programmes recorded under the schemes below are categorised as Mandatory private in SOCX.
- (9) Spending on some programmes recorded under the schemes below are categorised as Voluntary private in SOCX. (9) Includes (10).
- (10) SOCX Private insurance Health benefits in kind are from "OECD Health Data (www.oecd.org/health/healthdata)".
- (11) = (1) - (2) - (3) - (4) + (5) + (6) + (7) - (8) - (9) + (10)

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Code	Title of the programme	Description of the programme and attached notes
1. OLD AGE		
620.10.1.1.1.1	General scheme (IGFSS)	The minimum period of membership is 15 years of contributions paid or credited. To be granted a full pension, 40 years of contributions are required. The legal retirement age is 65 for men and women, 60 for unemployed persons and 55 for people in arduous or unhealthy work (specified occupations only). The retirement pension is based on the average monthly remuneration of the ten best years within the last 15. Non-contributory periods credited or taken into consideration are as follows: periods of sickness, maternity, unemployment, military service, compensation for inherent work risks, periods during which jury service is performed, periods spent caring for children, periods in the resistance. Disability pensions are taxable, but the tax regime is not the same as for earnings from work.
620.10.1.1.1.1.0	Enterprises (non means-tested)	Post and telecommunications, Portuguese broadcasting, bus companies, insurance companies.
620.10.1.1.1.1.1	General retirement fund (civil servants, pensioners)	Employees of the "Cofre de Previdencia" had their own retirement pension until 1989. No figures are available.
620.10.1.1.2.1	General scheme (IGFSS)	Data for "Early retirement pension" are included under "Early retirement for labour market reasons".
2. SURVIVORS		
620.10.2.1.1.1	General scheme (IGFSS)	Entitled persons are: surviving spouse aged at least 35, divorced spouse who is entitled to alimony, children until the age of 18 (25 or 27 in case of further or higher education), parents' dependant on the deceased (if no spouse or children). The surviving spouse is entitled to 60 per cent of the retirement or invalidity pension which the insured person was receiving or would have been entitled to at the time of death. Children are entitled to 20 (one child), 30 (two) or 40 (three or more) % of pension.
260.10.2.1.2.1	Death grant: General scheme (IGFSS)	As a rule, paid to the same people as the survivor's pension. The grant is six times the average wage calculated for the two best years within the last five.
3. INCAPACITY- RELATED BENEFITS (Disability, Occupational injury and disease, Sickness)		
620.10.3.1.1.1	General scheme (IGFSS)	Incapacity for work is recognized if earning capacity is not more than one third of the normal rate in that occupation. The minimum period of affiliation for entitlement is five years of contributions paid or credited (in special cases, after 1 095 days of sickness benefit and subject to endorsement by the medical board). Determining factors for the level of benefits are as follows: number of years' contributions, average monthly earnings of the ten best years within the last fifteen. Non-contributory periods credited or taken into consideration are as follows: periods of sickness, maternity, unemployment, military service, compensation for inherent work risks, periods during which jury service is performed, periods spent caring for children, periods in the resistance. Disability pensions are taxable, but the tax regime is not the same as for earnings from work.
620.10.3.1.1.2	Special social insurance scheme for agricultural activities (IGFSS)	They include some benefit payments which should have been included in "Old age cash benefits" and "Survivors".
620.10.3.1.1.3	Non-contributory scheme and other	Before 1988, data for funeral expenses from the non-contributory scheme were included under funeral expenses from the contributory schemes. Since 1988, the two categories are shown separately. As of 1987, funeral expenses managed by IGFSS include those to agricultural workers.
620.10.3.1.1.4	specific schemes (IGFSS)	
620.20.3.1.3.1	Labour accidents to private sector (insurance companies)	Compulsory private insurance for employees financed by the employers and compulsory private insurance for the self-employed.

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620.10.3.1.4.1	General scheme (IGFSS)	The daily benefit is 65 per cent of the average daily wage over the six months proceeding the two months in which the illness began, rising to 70 per cent thereof after unbroken incapacity for more than 365 days. There is no statutory provision for continued payment of salary.
4. HEALTH		
620.10.4.2.0.0	Public expenditure on health	See <i>OECD Health Statistics</i> .
5. FAMILY		
620.10.5.1.1.1	General scheme (IGFSS)	Family allowances are payable for children up to age 16 (or 24 if in further education/vocational training). In certain cases extensions of up to three years are granted for serious infirmity. Monthly amounts are determined on the basis of the family income, the number of beneficiaries and their respective ages. Special allowances are granted for handicapped children. These benefits are not taxable.
620.10.5.1.2.1	Birth grant : General scheme (IGFSS)	Maternity benefits are paid during maternity leave for 110 days (90 of which have to be after confinement), and for 14 to 30 days after miscarriage or delivery of a stillborn child. Paternity benefits are payable to the father in the event of the mother's physical or mental incapacity or death.
620.10.5.1.3.1	Other cash periodic benefits : General scheme (IGFSS)	A special education allowance is payable for children up to age 24 if they are attending an institution for special education or receiving other specific educational assistance. They are also entitled to a monthly living allowance.
6. ACTIVE LABOUR MARKET PROGRAMMES		
See OECD Labour Market Policy database.		
9. OTHER SOCIAL POLICY AREAS		
620.10.9.1.1.1	Non-contributory and other specific schemes (means-tested) (IGFSS): income support	If the allowance as calculated is less than the social pension under the non-contributory social security scheme, an amount equivalent to the social pension is payable. Family allowances are not taken into consideration when determining eligibility for the minimum income.