

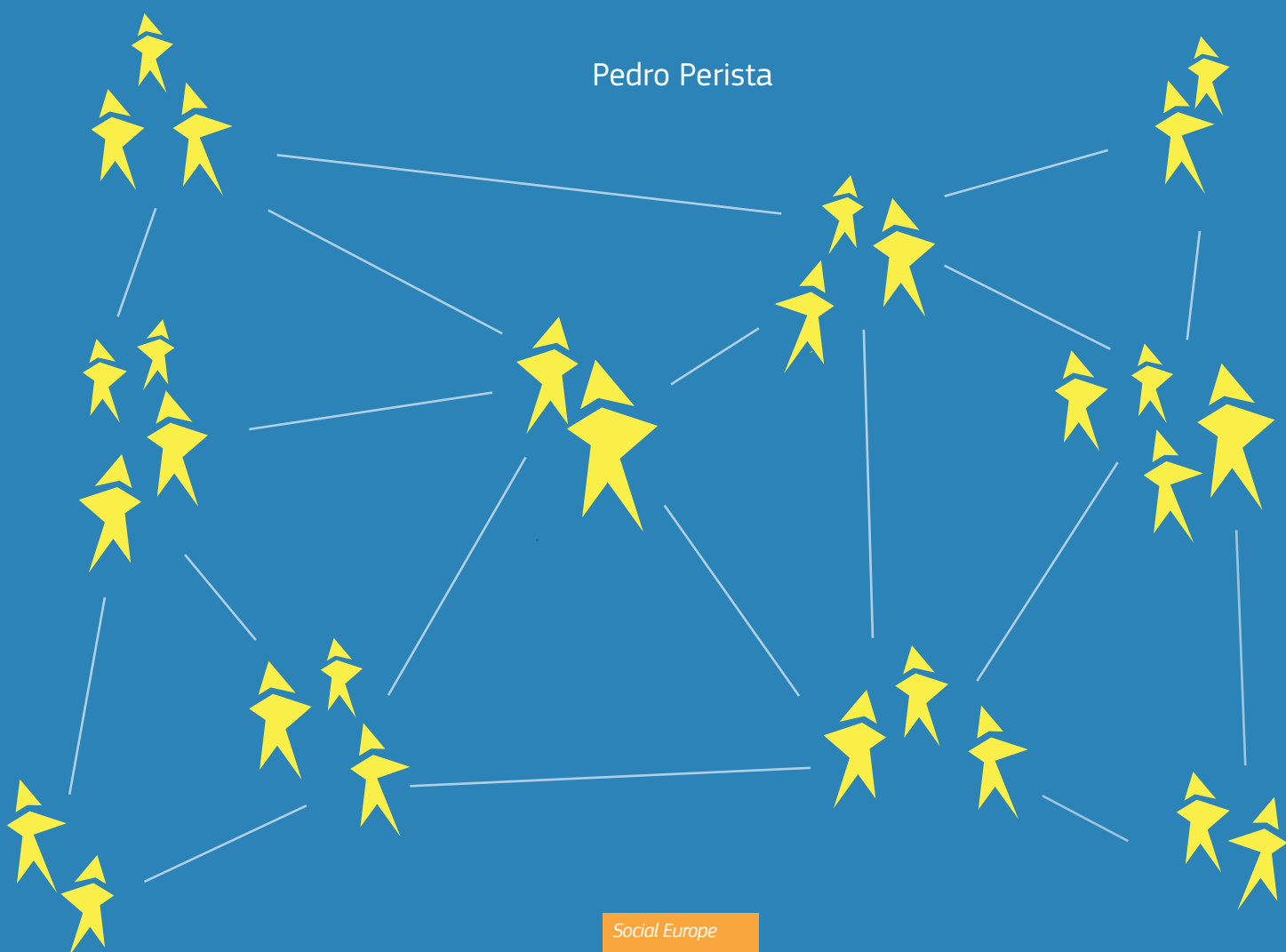


EUROPEAN SOCIAL POLICY NETWORK (ESPN)

Social protection and inclusion policy responses to the COVID-19 crisis

Portugal

Pedro Perista



Social Europe

EUROPEAN COMMISSION

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European Social Policy Network (ESPN)

**ESPN Thematic Report:
Social protection and inclusion
policy responses to the COVID-
19 crisis**

Portugal

2021

Pedro Perista

The European Social Policy Network (ESPN) was established in July 2014 on the initiative of the European Commission to provide high-quality and timely independent information, advice, analysis and expertise on social policy issues in the European Union and neighbouring countries.

The ESPN brings together into a single network the work that used to be carried out by the European Network of Independent Experts on Social Inclusion, the Network for the Analytical Support on the Socio-Economic Impact of Social Protection Reforms (ASISP) and the MISSOC (Mutual Information Systems on Social Protection) secretariat.

The ESPN is managed by the Luxembourg Institute of Socio-Economic Research (LISER) and APPLICA, together with the European Social Observatory (OSE).

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Summary

Between Monday, 3 February 2020 and Sunday, 18 April 2021, the total number of confirmed COVID-19 cases per 100,000 people was 6,740 for the EU-27 as a whole; in Portugal, it was 8,183. The total number of deaths per 100,000 people was 151 for the EU-27 versus 166 in Portugal.

After benefiting from a comparatively good scenario during the first wave of the pandemic in spring and summer 2020, Portugal was hit severely by COVID-19 and its impacts in late 2020 and early 2021. Thus, many of the traditional challenges faced by Portugal regarding social protection and social inclusion became even more pressing due to the COVID-19 crisis.

As a means of addressing its effects, over 30 different measures in the fields of social protection and social inclusion were put in place between March 2020 and January 2021. Most of them concerned either measures of job protection, provided through support for employers, employees and the self-employed, or measures related to minimum income schemes and other forms of social assistance. There were also measures related to unemployment benefits, health insurance, housing support and leave for parents whose children were unable to attend school or pre-school because of COVID-19.

The timeframe for which the measures were approved is illustrative of the initial approach to the pandemic. In most cases, measures approved in March 2020 were scheduled to last until June 2020, but were then extended – sometimes more than once. Most second-batch measures (April–May 2020) set December 2020 as the end date. Most third-batch measures concerned implementation during the second half of 2020. At the time of writing, approximately half of the measures had been extended beyond the period initially considered.

No data on the number of eligible people and/or applicants could be found for roughly half of the measures. As for the remainder, the figures are, in most cases, proxies or government projections echoed by the media. Similarly, no data on the number of recipients could be found for many of the measures.

The cost of those social protection and inclusion measures adopted by Portugal to address the social consequences of the COVID-19 pandemic in 2020 (and on which there are specific data) is thought to have reached a total of EUR 1.95 billion at the time of writing (i.e. about 0.9% of the Portuguese gross domestic product in 2019). Some 82% of that amount has been spent on job protection measures, provided through support for employers, employees and the self-employed. And approximately half of that amount has gone on a single measure: the simplified layoff scheme.

The COVID-19 pandemic has had a significant impact on the social protection system and on social inclusion policies in Portugal, if we consider the sheer number of the different measures to deal with the effects of the pandemic described in Section 2 of this report. On a less positive note, this highlights the flaws in what was already in place to provide an adequate response to the crisis. In any case, currently it does not seem possible to make a clear assessment of the extent to which the measures put in place in response to the crisis will contribute to reshaping the social protection system and social policies in Portugal on a permanent basis. None of the measures implemented so far have been made permanent. Moreover, much of the necessary legislation has been keen to emphasise that the measures are exceptional and/or temporary – and indeed, several of them were approved for a specific period of time and then extended as the pandemic dragged on.

There is also no indication that the measures are altering the dominant policy perspective that has narrowed the scope of public policies to focus on the 'most disadvantaged' and on providing support that does not seek to lift recipients above the poverty threshold. This has been the subject of debate spurred by the pandemic crisis, even if it has not been in the media spotlight. Some stakeholders, including political parties and the

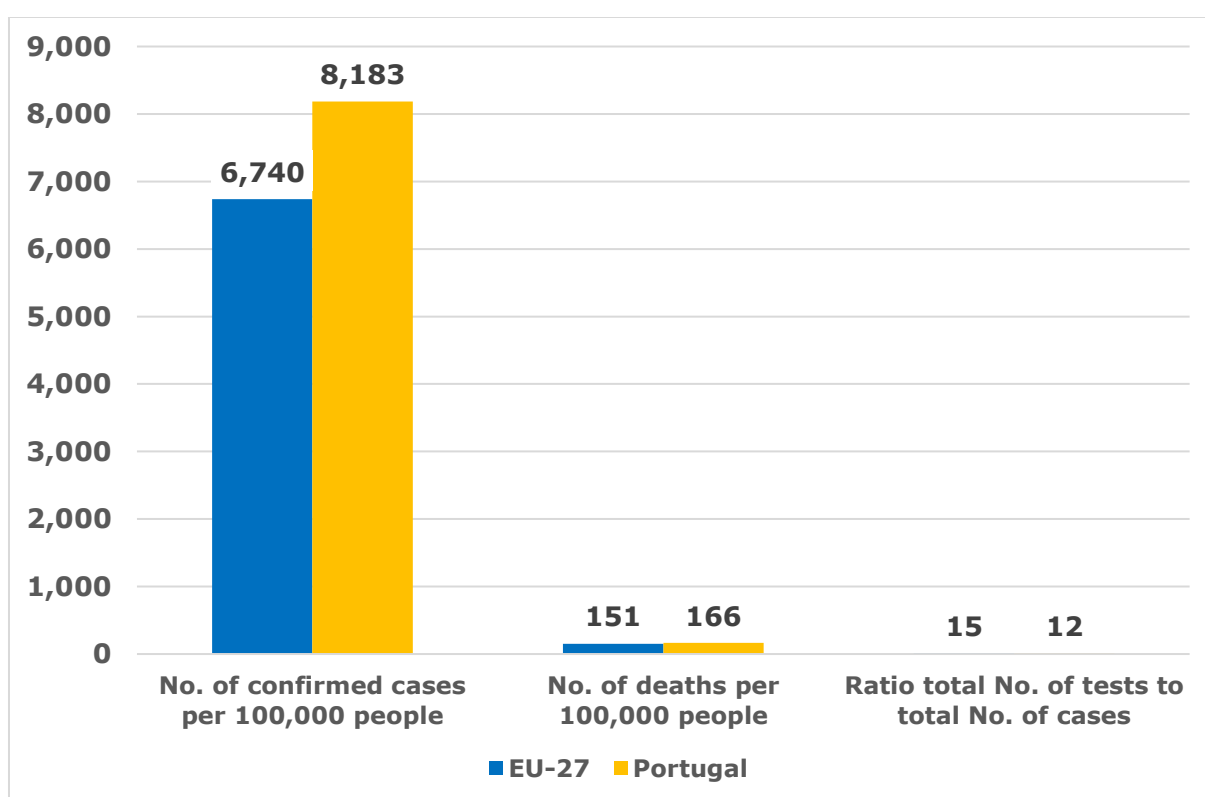
relevant non-governmental organisations, claim that there is room to address the immediate effects of the pandemic, while at the same time contributing to a structural solution to poverty in Portugal.

1 TRENDS OF THE PANDEMIC AND SOCIAL AND ECONOMIC IMPACT¹

1.1 Epidemiological situation

During the 63 weeks considered for these three indicators (from Monday 3 February 2020 to Sunday 18 April 2021), the total number of confirmed COVID-19 cases per 100,000 people was 6,740 for the EU-27 as a whole; in Portugal, it was 8,183. The total number of deaths per 100,000 people was 151 for the EU-27 versus 166 in Portugal. The ratio of the total number of COVID-19 tests conducted to the total number of confirmed cases was 15.3 for the EU-27 and 11.7 for Portugal.

Figure 1: Total number of COVID-19 cases and deaths per 100,000 people & ratio of total number of COVID-19 tests to total number of cases, 3 February 2020 to 18 April 2021 (EU-27 and Portugal)

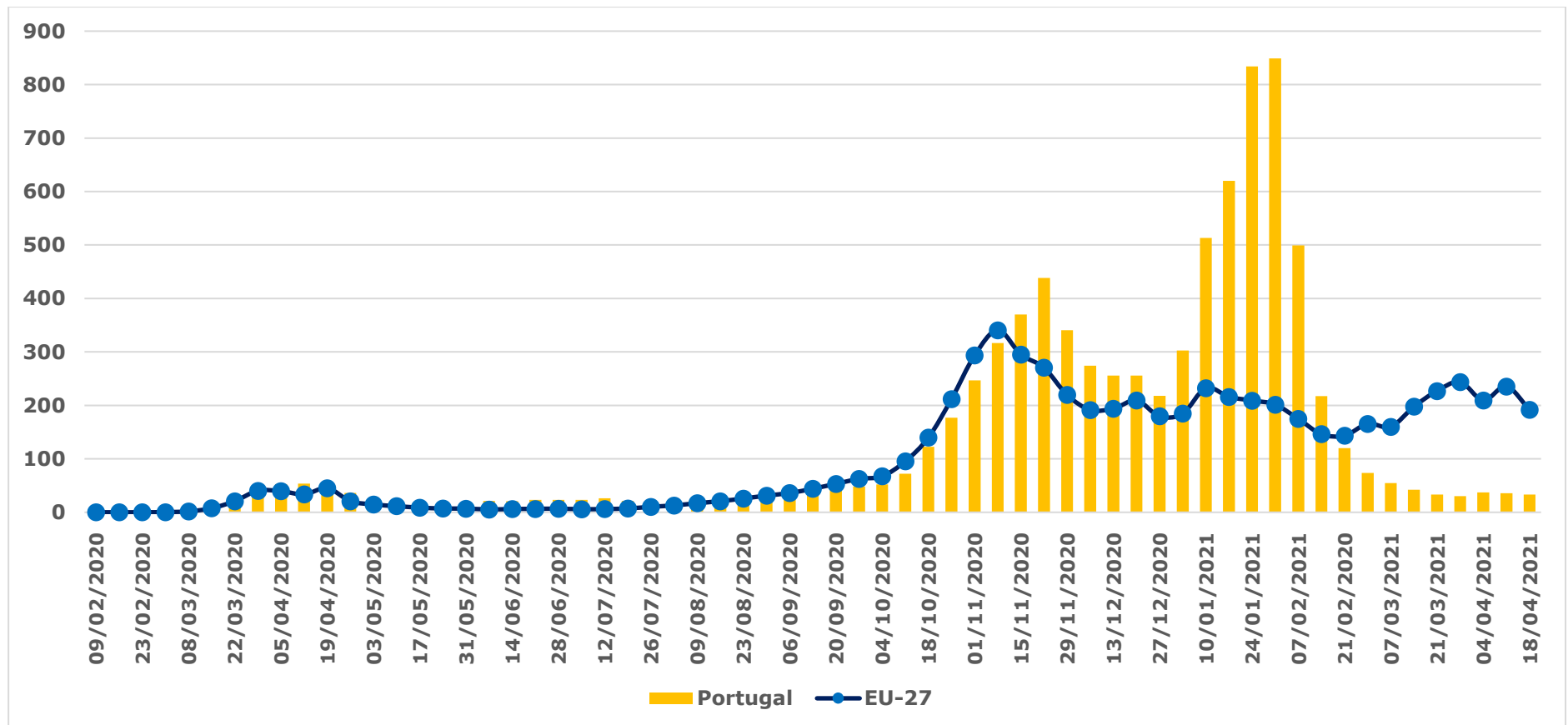


Source: Our World in Data (OWID) online database on COVID-19 - downloaded 26 April 2021

¹ Except if otherwise specified, the indicators presented in Sections 1.1 and 1.2 were calculated by the ESPN Network Core Team on the basis of data coming from two data sources: Our World in Data (OWID: <https://ourworldindata.org/coronavirus-source-data>) and the statistical office of the European Union (Eurostat: <https://ec.europa.eu/eurostat>). These indicators were calculated for all the 35 ESPN countries for which data were available. All of them are presented in Annex B of the following report: Isabel Baptista, Eric Marlier, Slavina Spasova, Ramón Peña-Casas, Boris Fronteddu, Dalila Ghailani, Sebastiano Sabato and Pietro Regazzoni (2021), *Social protection and inclusion policy responses to the COVID-19 crisis. An analysis of policies in 35 countries*, European Social Policy Network (ESPN), Luxembourg: Publications Office of the European Union. This report also provides additional explanations on the data sources used and the calculation of the indicators. In addition, Annex B of the report provides the country results related to all ESPN countries included in the two international data sources used (see Tables B1.1, B2.1 and B3.1 for Figure 1, Table B1.2 for Figure 2, Table B2.2 for Figure 3, Table B3.2 for Figure 4, Tables B4.1, B4.2 and B4.3 for Figure 5, Table B5 for Figure 6, Tables B6.1-3 for Figures 7a-c, and Tables B7.1-3 for Figures 8a-c). The full report and its various annexes can be downloaded [here](#).

In the last week of observations (from Monday 12 April 2021 to Sunday 18 April 2021), the number of confirmed COVID-19 cases per 100,000 people reached 191.8 for the EU-27. In Portugal, it was 33.4.

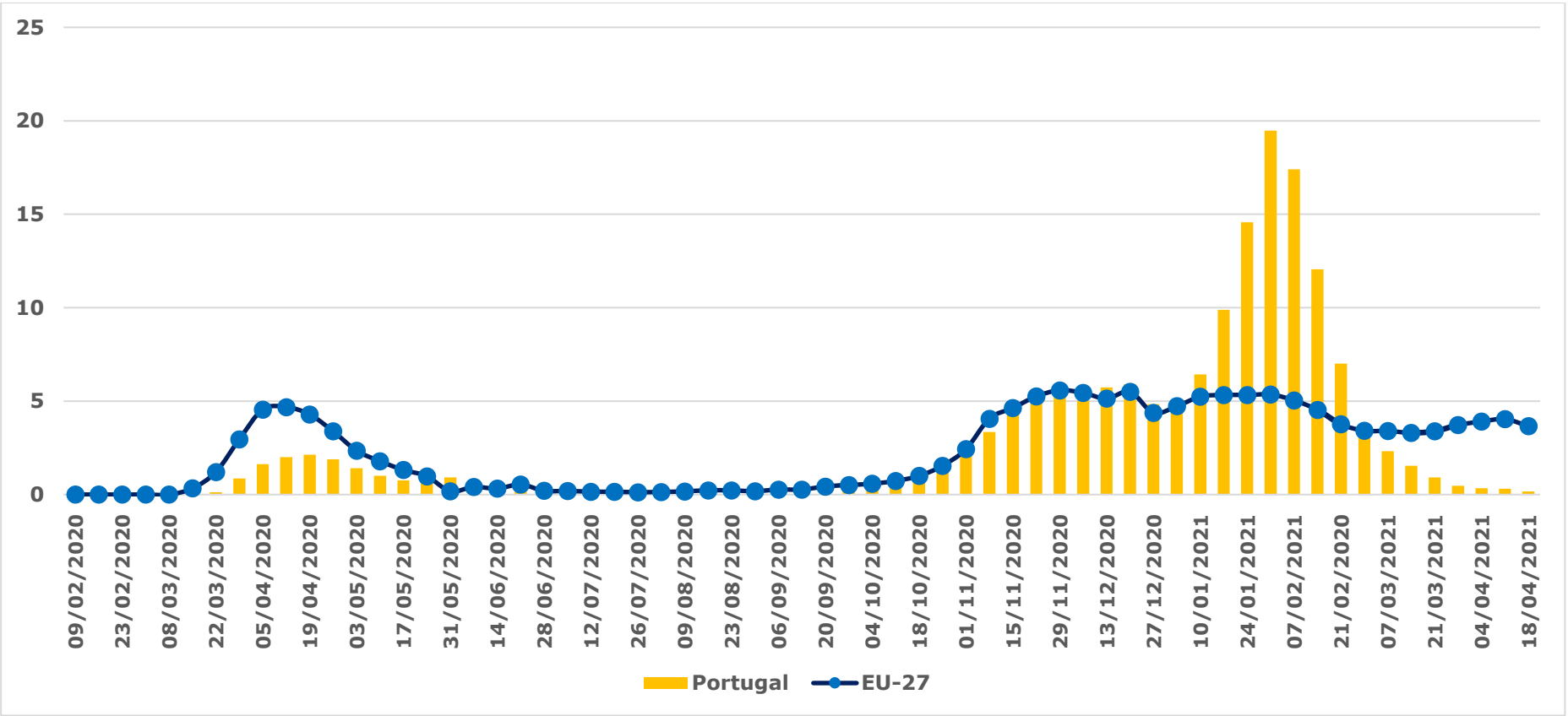
Figure 2: Weekly evolution - Number of confirmed COVID-19 cases per 100,000 people from 3 February 2020 to 18 April 2021 (EU-27 and Portugal)



Source: Our World in Data (OWID) online database on COVID-19 - downloaded 26 April 2021.

In the last week of observations (from Monday 12 April 2021 to Sunday 18 April 2021), the number of COVID-19 deaths per 100,000 people reached 3.66 for the EU-27 as a whole. In Portugal, it was 0.17.

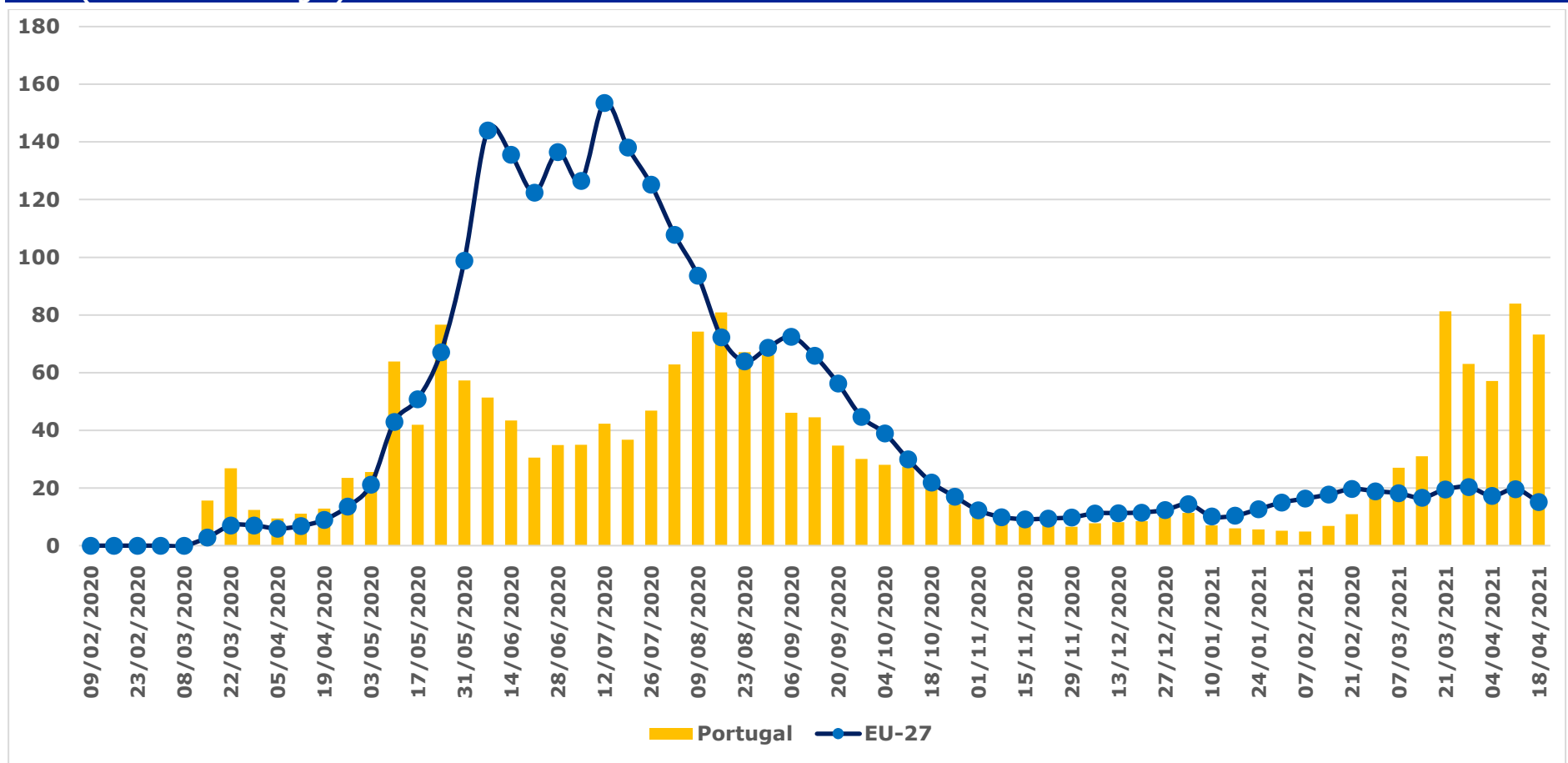
Figure 3: Weekly evolution - Number of COVID-19 deaths per 100,000 people, 3 February 2020 to 18 April 2021 (EU-27 and Portugal)



Source: Our World in Data (OWID) online database on COVID-19 - downloaded 26 April 2021.

In the last week of observations (from Monday 12 April 2021 to Sunday 18 April 2021), the number of COVID-19 tests per new confirmed COVID-19 cases was 15.2 for the EU-27. In Portugal, it was 73.2.

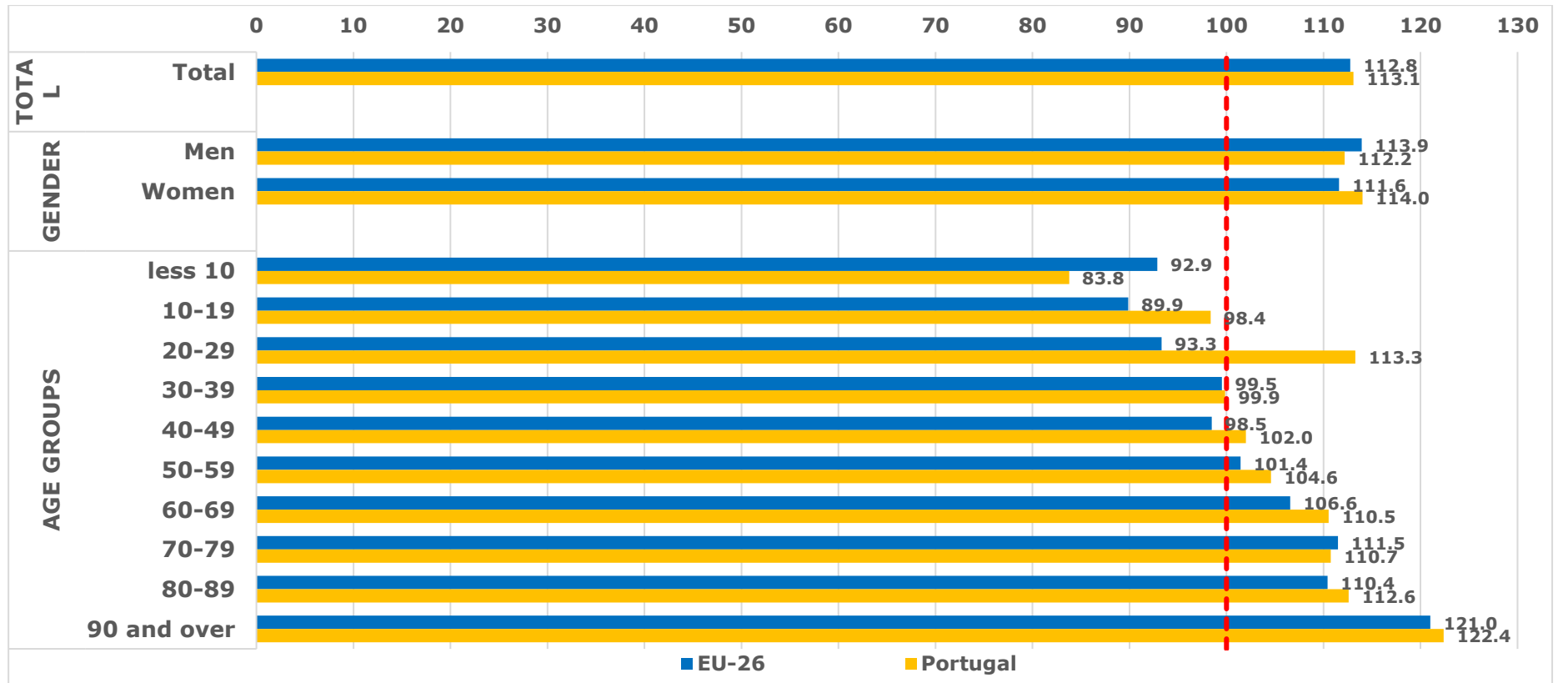
Figure 4: Weekly evolution - Number of COVID-19 tests per new confirmed COVID-19 case, 3 February 2020 to 18 April 2021 (EU-27 and Portugal)



Source: Our World in Data (OWID) online database on COVID-19 - downloaded 26 April 2021. Full quote for these testing data: Hasell, J., Mathieu, E., Beltekian, D. et al. (2020). "A cross-country database of COVID-19 testing". *Sci Data* 7, 345 (2020) (<https://www.nature.com/articles/s41597-020-00688-8>).

The excess mortality ratio for 2020 is the total number of deaths (without distinction of causes) in the year 2020 expressed as a percentage of the previous 4-year (2016-2019) annual average of the total number of deaths. For the EU-26 average (no data for Ireland), the ratio of the total population is 112.8% while it is 113.1% in Portugal. For the EU-26, it is 113.9% for men and 111.6% for women. In Portugal, these gendered ratios are 112.2% and 114.0% respectively. Excess mortality is higher among older age groups. For those aged 90 years and more it reaches 121.0% for EU-26 and 122.4% for Portugal.

Figure 5: Excess mortality - Total number of all deaths in 2020 as percentage of the 2016-2019 annual average (including gender and age breakdowns (EU-26 and Portugal))

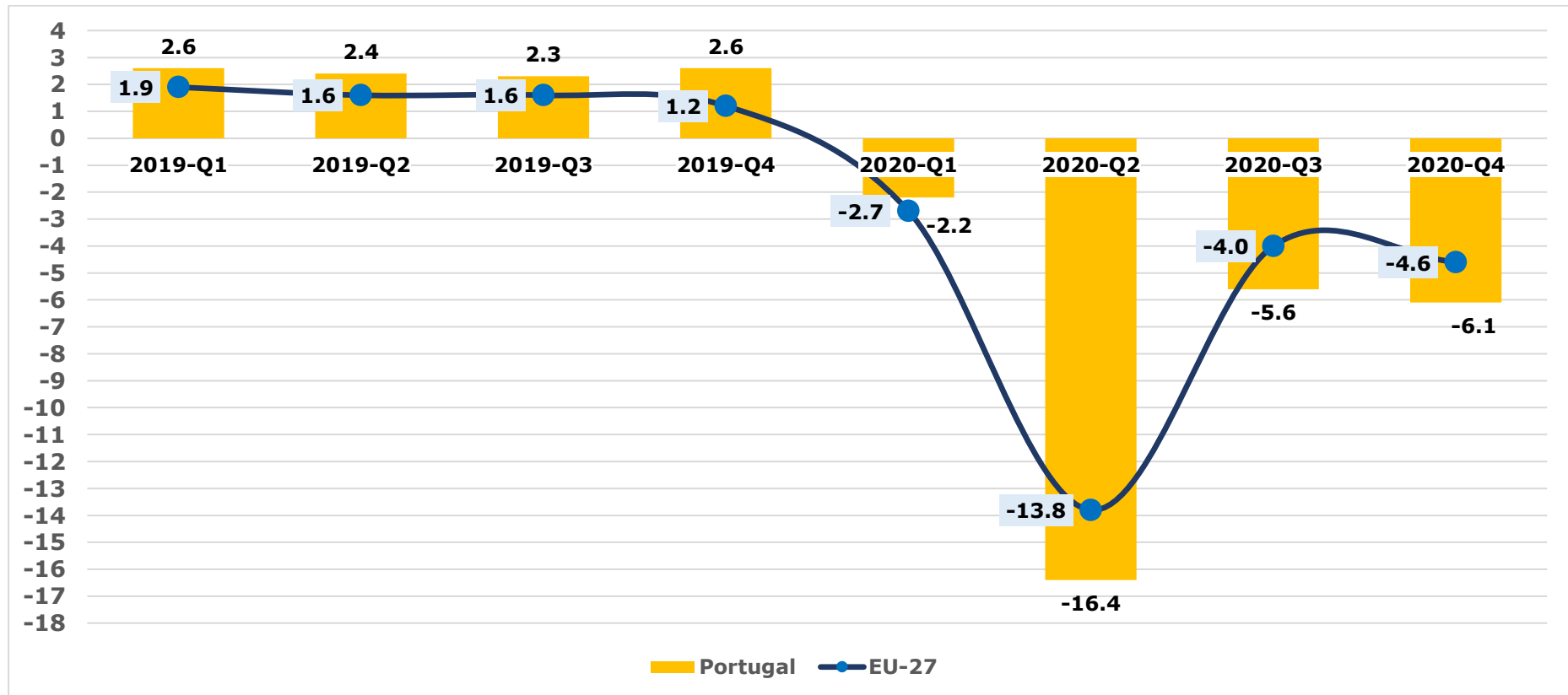


Source: Eurostat - indicator [DEMO_R_MWK_10_custom_560457] Deaths by week, sex and 10-year age groups - downloaded 26 April 2021. For Bosnia and Herzegovina: Agency for statistics of Bosnia and Herzegovina (data received upon request on 19 April 2021).

1.2 Economic and (un)employment situation

In the EU-27, GDP in the fourth quarter (2020-Q4) of 2020 fell by 4.6% compared to the fourth quarter of 2019 (2019-Q4). In Portugal, the decrease was 6.1% for the same period.

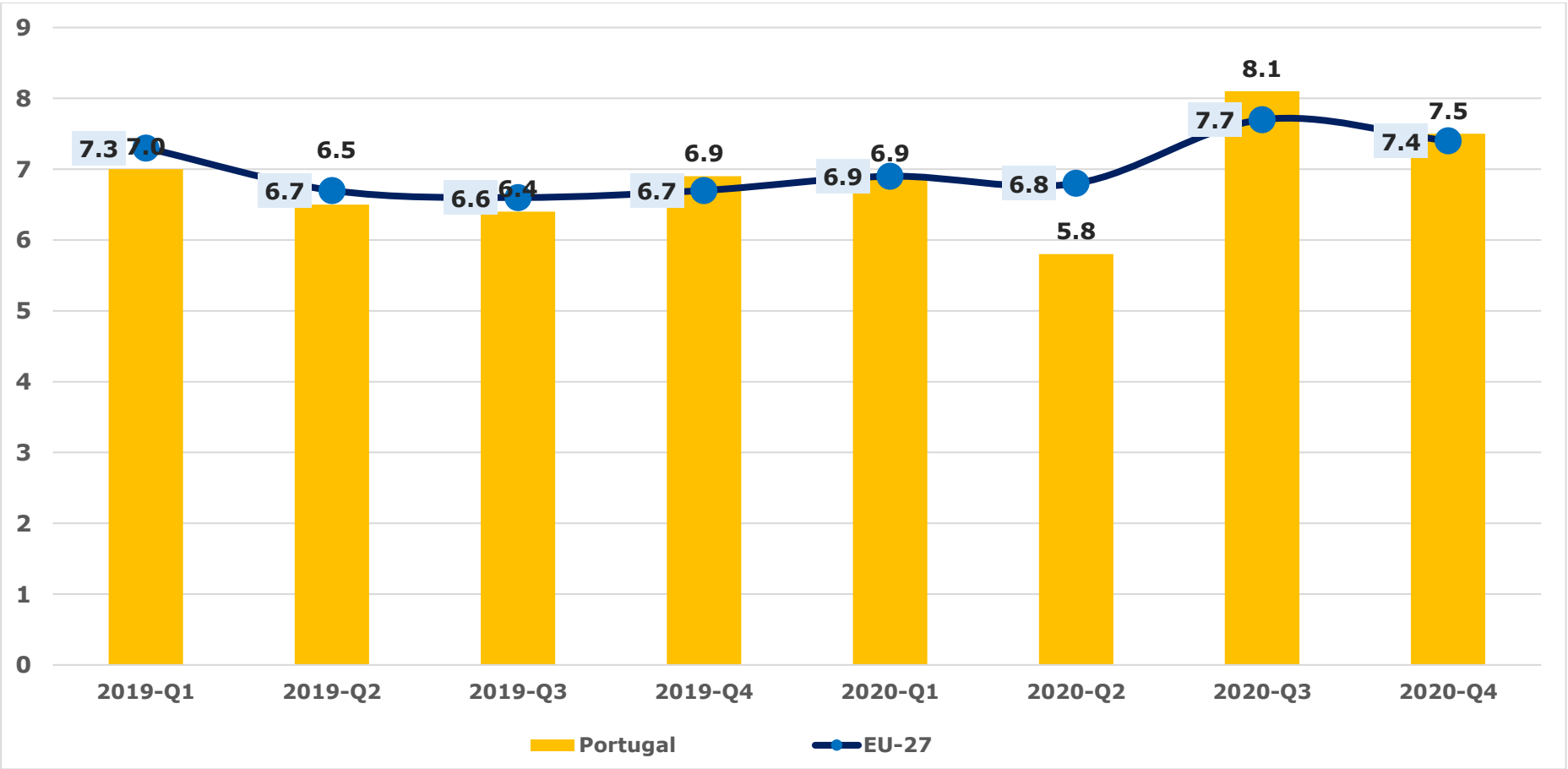
Figure 6: Gross domestic product at market prices, chain-linked volumes prices adjusted, percentage changes in quarter compared with same quarter in previous year (2019-2020, EU-27 and Portugal, %)



Source: Eurostat -GDP and main components (output, expenditure and income) - indicator [NAMQ_10_GDP__custom_507806] - downloaded 26 April 2021.

In the fourth quarter of 2020 (2020-Q4), the unemployment rate in the EU-27 for people aged 15-64 years is 7.4%. In Portugal, it is 7.5%.

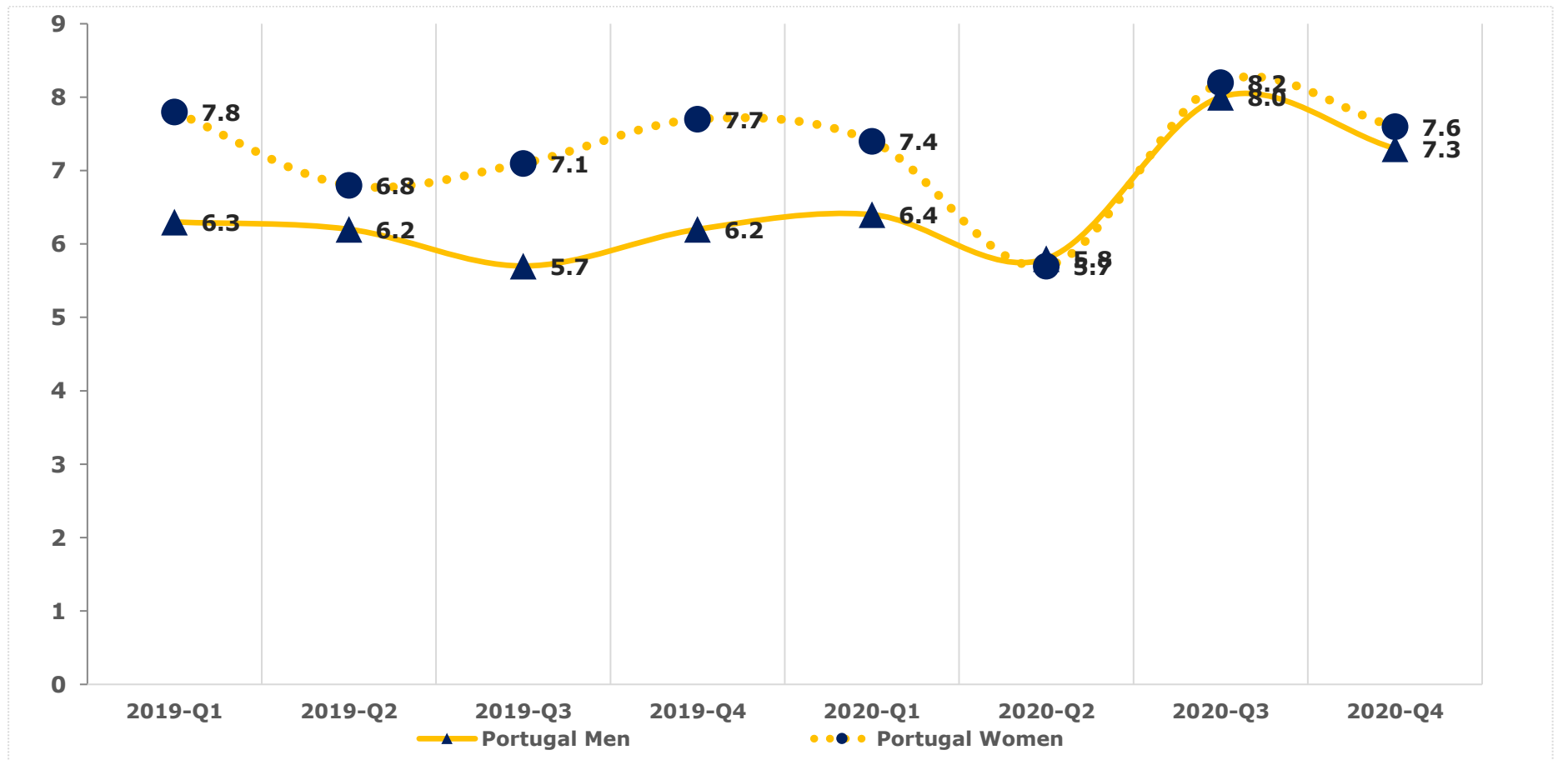
Figure 7a: Seasonally-adjusted unemployment rate, quarterly data, total population aged 15-64 (2019-2020, EU-27 and Portugal, %)



Source: Eurostat LFS - indicator [lfsq_urgan] - downloaded 26 April 2021.

In the fourth quarter of 2020 (2020-Q4), the unemployment rate in the EU-27 for people aged 15-64 years is 7.1% for men and 7.7% for women. In Portugal, these figures are 7.3% and 7.6% respectively.

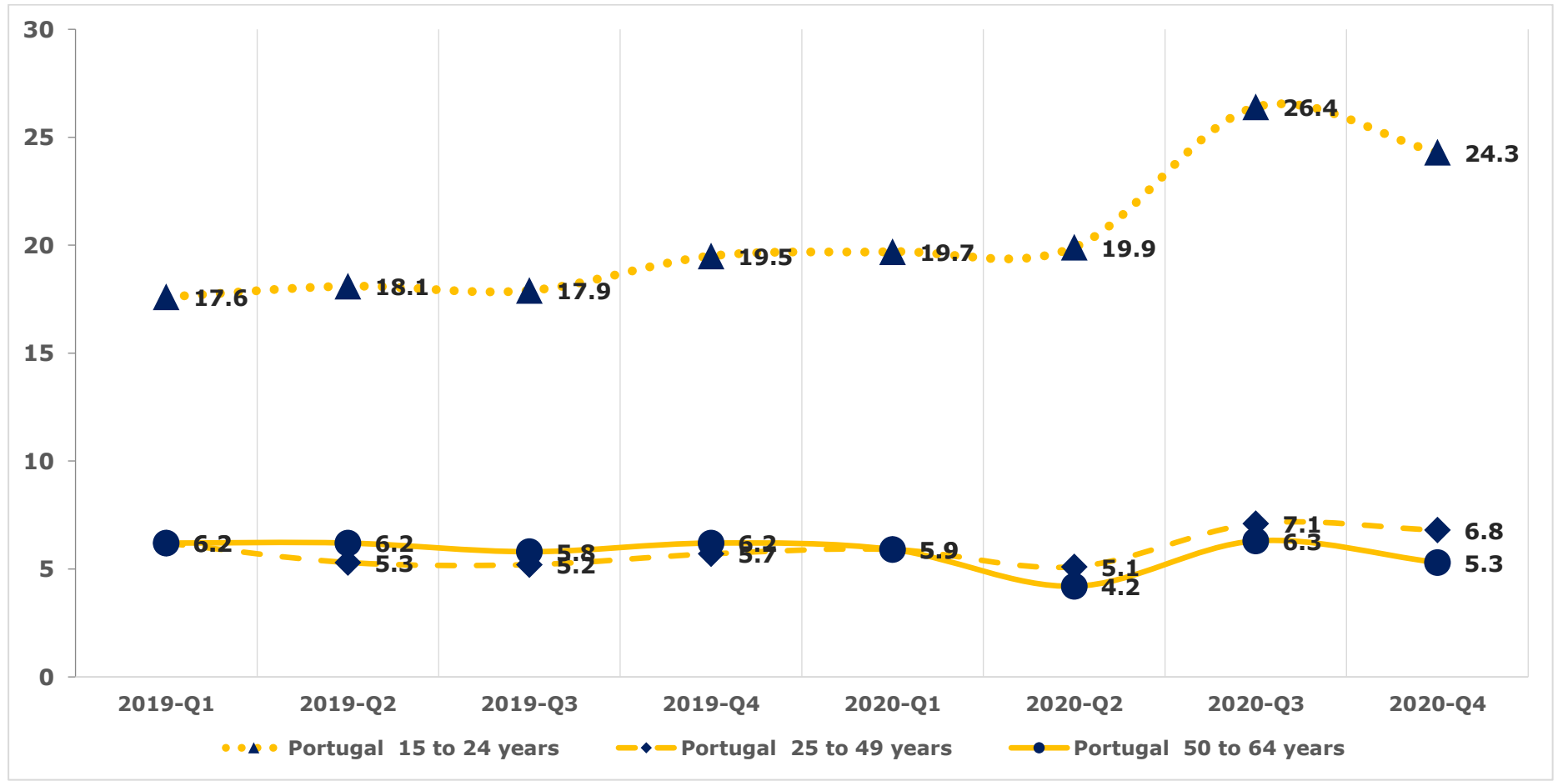
Figure 7b: Seasonally-adjusted unemployment rate, quarterly data, total population aged 15-64 – by gender (2019-2020, Portugal, %)



Source: Eurostat LFS - indicator [lfsq_urgan] - downloaded 26 April 2021.

In the fourth quarter of 2020 (2020-Q4), the unemployment rate in the EU-27 is 16.9% for the 15-24 age group. In Portugal, it is 24.3%.

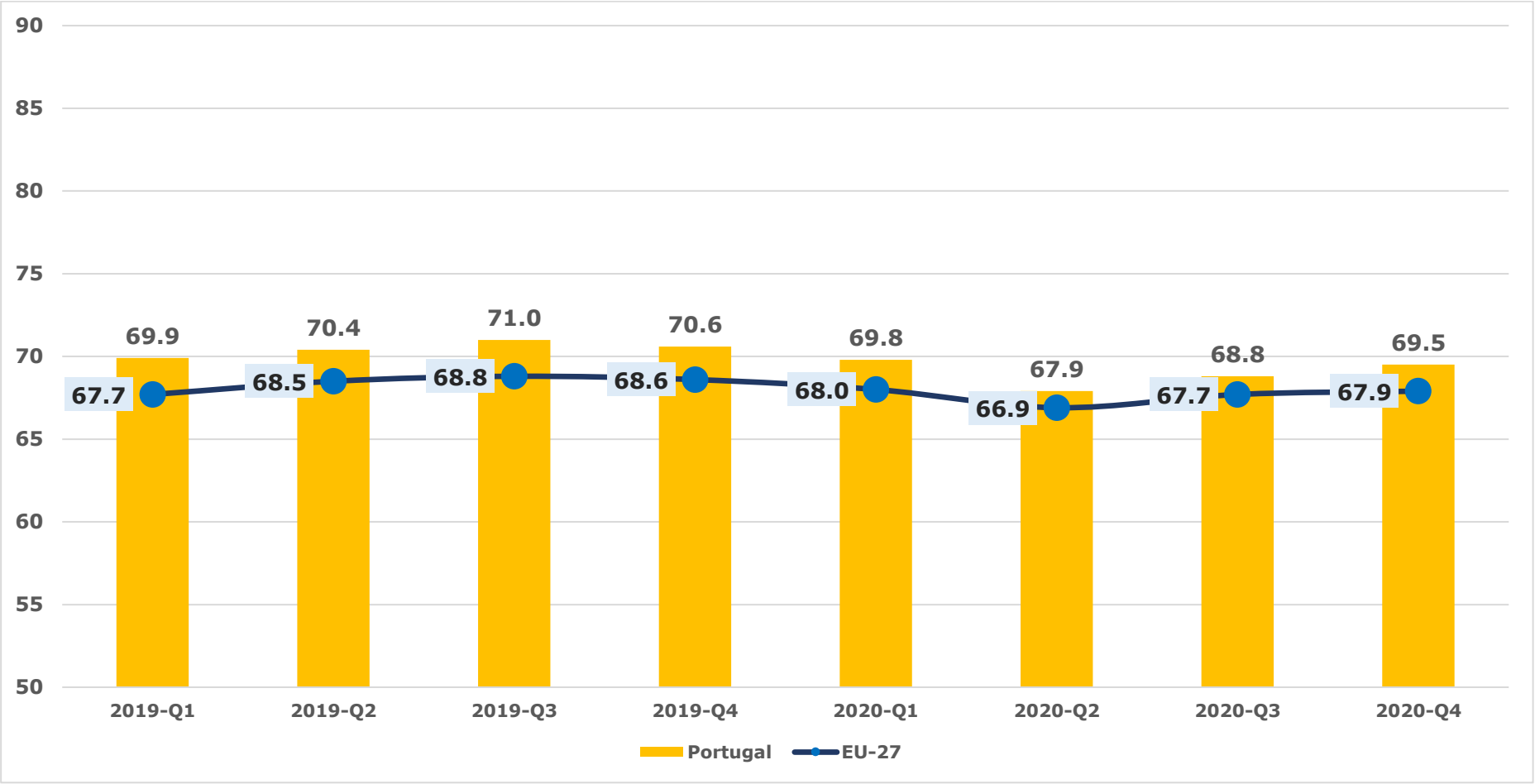
Figure 7c: Seasonally-adjusted unemployment rate, quarterly data, total population aged 15-64 – by age group (2019-2020, Portugal, %)



Source: Eurostat LFS - indicator [lfsq_urgan] - downloaded 26 April 2021.

In the fourth quarter of 2020 (2020-Q4), the employment rate for people aged 15-64 in the EU-27 is 67.9%. In Portugal, it is 69.5%.

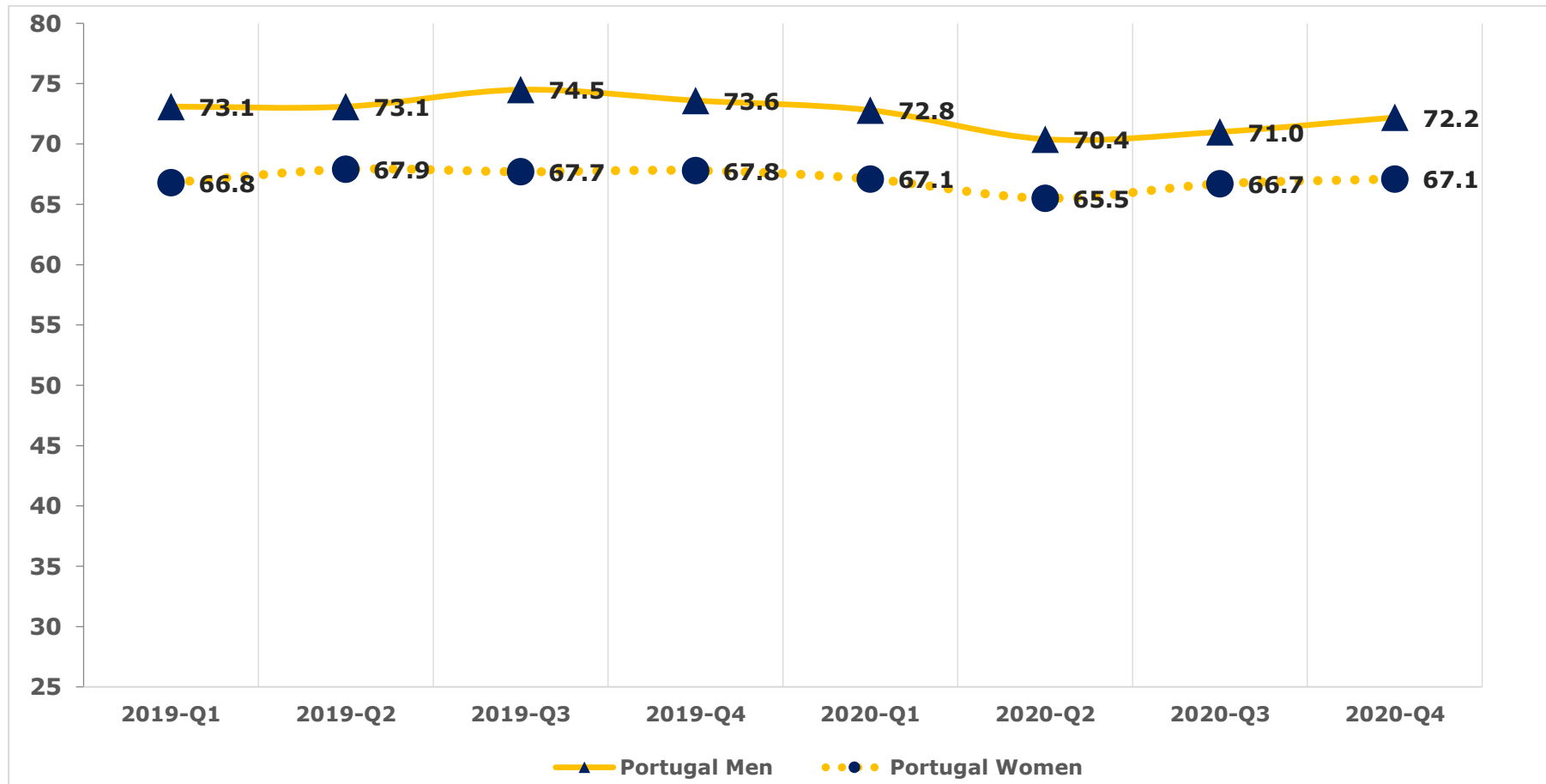
Figure 8a: Seasonally-adjusted employment rate, quarterly data, total population aged 15-64 (2019-2020, EU-27 and Portugal, %)



Source: Eurostat LFS - indicator [lfsq_ergan] - downloaded 26 April 2021.

In the fourth quarter of 2020 (2020-Q4), the employment rate in the EU-27 is 73.0% for men and 62.8% for women. In Portugal, these figures are 72.2% and 67.1% respectively.

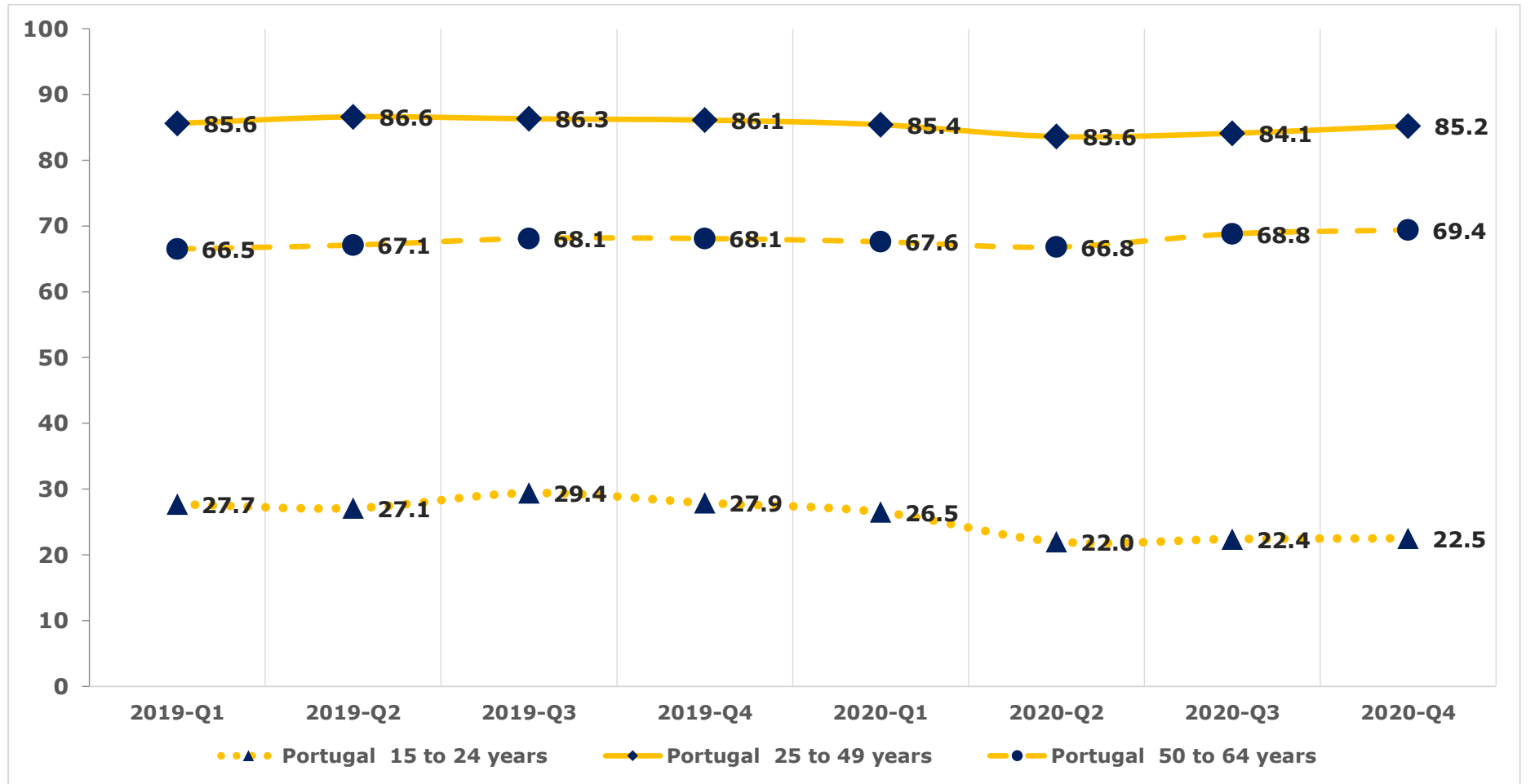
Figure 8b: Seasonally-adjusted employment rate, quarterly data, total population aged 15-64 – by gender (2019-2020, Portugal, %)



Source: Eurostat LFS - indicator [lfsq_ergan] - downloaded 26 April 2021.

In the fourth quarter of 2020 (2020-Q4), the employment rate in the EU-27 is 31.1% for the 15-24 age group. In Portugal, it is 22.5%.

Figure 8c: Seasonally-adjusted employment rate, quarterly data, total population aged 15-64 – by age group (2019-2020, Portugal, %)

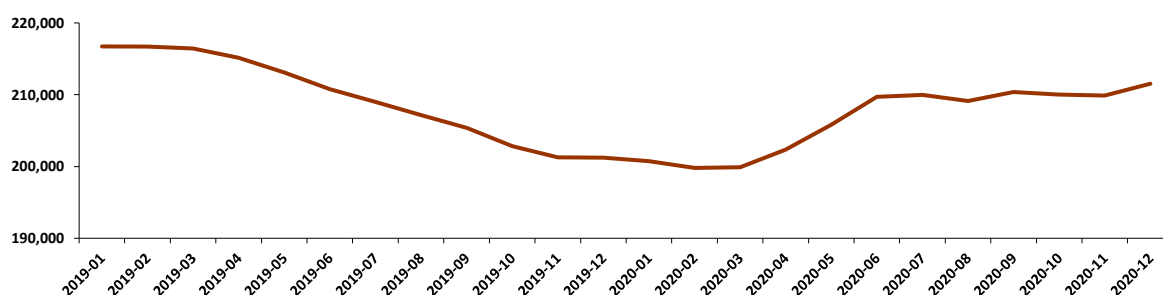


Source: Eurostat LFS - indicator [lfsq_ergan] - downloaded 26 April 2021.

1.3 Poverty, inequality and social exclusion situation

Not much relevant data on the evolution of poverty, inequality and social exclusion could be found. Data regarding the social insertion income (RSI) show that between March and June 2020 there was a steep increase, followed by relative stabilisation until December 2020 (Figure 9). This situation contrasts with the decline registered over 2019 and up to March 2020. The number of recipients in December 2020 represented an increase of about 5% over the figure for December 2019.

Figure 9: Evolution of the number of recipients of social insertion income (RSI), monthly data for 2019 and 2020 (Portugal)



Source: Institute of Social Security. Available at: http://www.seg-social.pt/documents/10152/336284/Dados+Mensais+de+RSI+200401_a_202012.xls/e1815900-1b0e-4cca-bdbc-c4df2de24c45 (downloaded on 9 February 2021).

An additional statistical element concerns the number of people supported by the Portuguese food bank. According to figures reported in the media,² that number increased from around 380,000 before the pandemic to the current 450,000, i.e. an increase of almost 18%.

According to the European Commission's Employment and Social Developments Quarterly Review – December 2020, year-on-year growth in gross disposable household income (GDHI) in the second quarter of 2020 (2020Q2) in Portugal was -2.91%, which compares with a steeper decrease in the EU-27 (-5.38%). The real GDHI per capita (index 2012 = 100) in Portugal fell from 117.9 in 2019Q2 to 114.2 in 2020Q2. This compares with 113.9 and 107.6, respectively, for the EU-27. However, the reported financial distress in the lowest income quartile in Portugal decreased from 23.4% in 2019Q3 to 22.1% in 2020Q3. This compares with 23.1% (both dates) for the EU-27 (EC, 2020b).

² “Em 27 anos no banco alimentar nunca vi nada assim”. Pedidos de ajuda de famílias disparam’, TVI24, 24 February 2021, available at: <https://tvi24.iol.pt/economia/covid-19/em-27-anos-no-banco-alimentar-e-nunca-vi-nada-assim-pedidos-de-ajuda-de-familias-disparam>

2 Social protection and inclusion measures in response to the pandemic³

This section provides a brief description of the main measures related to social protection and social inclusion that have been put in place to help mitigate the financial and social distress produced by the economic downturn caused by the pandemic. It is based on readily available data and evidence. For each measure, it provides the following:

- a) Short description of the measure.
- b) Category: Is it a flat benefit, a conditional benefit, both a flat and a conditional benefit, or neither a flat nor a conditional benefit?
- c) Timing: When did the measure start/end? Has it been extended?
- d) Depending on the category:
 - Amount and duration (for flat measures);
 - Range (minimum-maximum), duration and conditionality (thresholds) (for conditional measures).

If the measure is neither flat nor conditional, this is 'Not applicable'.
- e) Targeted population: what is/are the target(s), i.e. the parts of the population/labour force/sectors targeted by the measure? If data and evidence are readily available, estimated number of people targeted and/or applicants.
- f) Beneficiaries: What is the number of recipients of the measure (if relevant and available)?
- g) Novelty: Was the measure new or an already existing one that was adapted?

2.1 Measures related to unemployment benefits

2.1.1 *Prorrogação automática de subsídios de desemprego (Automatic continuation of unemployment benefits)*

- a) Short description: In March 2020, all unemployment benefits ending after 12 March 2020 were automatically continued.
- b) Category: Conditional benefit.
- c) Timing: The measure was first put in place between 12 March 2020 and June 2020; it was then extended to December 2020, but only regarding unemployment assistance. A new automatic continuation has been in place since 1 January 2021, but only regarding unemployment insurance, unemployment assistance and benefits for termination of activity in 2021; these are to be automatically continued for a period of 6 months. This means that the measure may continue to be in place until June 2022, if applied to benefits ending in December 2021.
- d) Range, duration and conditionality: The measure concerns the automatic continuation of unemployment benefits. Thus, the amount of the benefit remains the same. Overall, unemployment insurance corresponds to 65% of the reference wage. The monthly minimum is the equivalent amount of the social support index (*indexante dos apoios sociais* – IAS) (i.e. EUR 438.81 in 2021), unless the net wage is lower than the IAS or 1.15 IAS (i.e. EUR 504.63 in 2021) when the reference wage is equal to or greater than the monthly minimum wage (i.e. EUR 665 in 2021). The monthly maximum is 2.5 IAS (i.e. EUR 1,097.03 in 2021).
- e) Targeted population: All the recipients of unemployment benefits, including people who were previously in standard and non-standard employment (so long as they

³ The temporary measures mentioned in this report refer to the situation as of 15 April 2021. Their duration may have been extended since then.

qualify for unemployment insurance or unemployment assistance), and also recipients of the benefit for termination of activity, i.e. people previously working as self-employed who earned their income through a registered business of their own or possessed an individual commercial establishment, or were considered economically dependent (i.e. they performed at least 50% of their yearly activity for the same entity).

- f) Beneficiaries: The number of recipients of unemployment insurance and unemployment assistance in March 2020 was 145,297 and 27,649, respectively. According to the latest figures issued by the Office for Strategy and Planning of the Ministry of Labour, Solidarity and Social Security (*Gabinete de estratégia e planeamento do Ministério do Trabalho, Solidariedade e Segurança Social – GEP/MTSSS*), the number of recipients of the automatic continuation of unemployment insurance and unemployment assistance was 33,193 and 12,610. This represents 22.8% and 45.6% of the number of recipients in March 2020.
- g) Novelty: These provisions concern a set of adjustments to previously existing measures in terms of duration.

2.1.2 Subsídio de desemprego e subsídio por cessação de atividade - redução dos prazos de garantia (Reduction in insurance periods for access to unemployment insurance and to the benefit for termination of activity)

- a) Short description: The measure consisted of a reduction in the insurance periods required for access to unemployment insurance and to the benefit for termination of activity.⁴ The employment requirement period was halved: from 360 days to 180 days of registered work, with the corresponding contribution payment in the 24 months prior to unemployment. Recipients were entitled to the benefit from the moment they needed it until 31 December 2020. Another special feature of this measure was that from 1 January 2021, these unemployed people automatically transited to unemployment assistance, without having to meet means-testing conditions. The economically dependent self-employed (i.e. those self-employed individuals with at least 50% of their income originating from a single entity) were entitled to the benefit for termination of activity if they had at least 180 days of activity (rather than the usual minimum of 360 days) with the corresponding contribution payment in the 24 months prior to involuntary termination of the service agreement, and so long as they were considered economically dependent on that entity in 2019. Self-employed with entrepreneurial activity and members of statutory bodies⁵ who became unemployed involuntarily, due to termination of activity, were entitled to the benefit for termination of activity if they had at least 360 days of activity (rather than the usual minimum of 720 days) with the corresponding contribution payment in the 48 months prior to the termination of activity.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: The measure was approved in July 2020 and was in place until December 2020. However, it only applied to unemployment registered between 19 March and 30 June 2020.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Everyone with a work contract, as well as economically dependent self-employed (i.e. self-employed with at least 50% of their income originating from a single entity), self-employed with entrepreneurial activity and members of statutory bodies who became involuntarily unemployed due to termination of activity during the period between 19 March and 30 June 2020.

⁴ Unemployment insurance applies to employees, while the benefit for termination of activity applies to the self-employed.

⁵ E.g. members of the Board of Directors.

- f) Beneficiaries: According to media reports,⁶ at the end of 2020 there were only 600 recipients of this support measure.
- g) Novelty: It represented adjustments to previously existing measures, notably regarding the eligibility conditions.

2.1.3 *Redução do número de dias de trabalho por conta de outrem, com o correspondente registo de remunerações, necessário para o acesso ao subsídio social de desemprego (Reduction in the number of workdays as an employee, with corresponding contribution payment, needed for access to unemployment assistance)*

- a) Short description: The minimum employment record needed for access to unemployment assistance was reduced from 120 to 60 days (in the 12 months prior to unemployment) if unemployment resulted from the termination of a temporary contract or from the employer's decision to terminate the contract during the probationary period; and from 180 to 90 days (in the 12 months prior to unemployment) in all other cases. However, the duration of the benefit was limited to 60 and 90 days, respectively.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: The measure started in May 2020 and was in place until 30 June 2020.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Potential recipients of unemployment assistance.
- f) Beneficiaries: No data could be found.
- g) Novelty: This concerns adjustments to a previously existing measure in terms of its access conditions and duration.

2.2 Measures of job protection provided through support to the employers, employees and the self-employed

2.2.1 *Complemento de estabilização (Stabilisation supplement)*

- a) Short description of the measure: The measure consisted of a one-off payment to employees who had experienced a reduction in their income.
- b) Category: Conditional benefit.
- c) Timing: The benefit was paid in July 2020.
- d) Range, duration and conditionality: The measure consisted of a one-off payment made in July 2020. Its amount was intended to be as close as possible to the income loss resulting from a month spent laid off, although it ranged from a minimum of EUR 100 to a maximum of 80% of the IAS (i.e. EUR 351.05 in 2020).
- e) Targeted population: All those on work contracts where the basic wage was higher than the minimum wage (i.e. EUR 635 in 2020) and lower than or equal to twice the minimum wage (i.e. EUR 1,270 in 2020), who were laid off for at least 30 consecutive days between April and June 2020.
- f) Beneficiaries: The number of recipients amounted to 334,000 people.
- g) Novelty: This was a new measure.

⁶ 'Subsídio de desemprego mais acessível só chegou a 600 pessoas', *Jornal de Negócios*, 28 December 2020, available at: <https://www.jornaldenegocios.pt/economia/seguranca-social/detalhe/subsidio-de-desemprego-mais-acessivel-so-chegou-a-600-pessoas?adsVideoViewed=1>

2.2.2 *Medida extraordinária de incentivo à atividade profissional (Extraordinary incentive to stimulate professional activity)*

- a) Short description of the measure: The measure consisted of monthly financial support.
- b) Category: Conditional benefit.
- c) Timing: The measure was first set to be in place between March and December 2020. It was resumed in 2021, to be in place during the period of suspension of activities and/or the closure of facilities following legislation or a government decision.
- d) Range, duration and conditionality: The benefit was provided for a period of 1 month, with the possibility of extension for up to 3 months. The monthly amount depended on the average invoicing between March 2019 and February 2020 and the subsequent shortfall in invoicing, and it ranged from EUR 93.45 (lowest contribution base in 2020) to EUR 219.41 (i.e. 50% of the IAS in 2020).
- e) Targeted population: Self-employed workers who had ceased their activity or had seen a decline in invoicing of at least 40% in the 30 days prior to the application, compared to the corresponding period of 2019; in the case of those who had been in business for less than a year, the whole period of their activity supplied the benchmark average. Between March and May 2020, the measure targeted only workers who were exclusively self-employed. But from May 2020, it also targeted those who combined self-employment with work as an employee, so long as the monthly income from the latter was no higher than 1 IAS (i.e. EUR 438.81 in 2020). In 2021, it targeted only those self-employed involved in activities that were suspended or closed.
- f) Beneficiaries: According to data issued by the GEP/MTSSS, the number of applications in 2021 was 9,828 in January, 8,936 in February and 8,080 in March. No data regarding 2020 could be found.
- g) Novelty: This is a new measure.

2.2.3 *Apoio extraordinário à redução da atividade económica de trabalhador independente (Extraordinary support to help with the decrease in economic activity of self-employed workers)*

- a) Short description of the measure: The measure consists of an allowance compensating for the decrease in the economic activity of self-employed workers.
- b) Category: Conditional benefit.
- c) Timing: The measure was first put in place from March to December 2020, and it resumed in January 2021. It was still in place when this report was completed, in mid-April 2021.
- d) Range, duration and conditionality: The benefit could be claimed for up to 6 months, whether consecutive months or not. Its amount was calculated according to the mean remuneration registered in the 12 months prior to the application. The minimum amount of the benefit was 50% of the IAS (i.e. EUR 219.41 in 2021). The maximum amount was 1 IAS (EUR 438.81 in 2020), provided the mean remuneration registered was lower than 1.5 IAS (i.e. EUR 658.22 in 2021). If the mean remuneration was equal to or greater than 1.5 IAS, then the maximum amount of the benefit corresponded to two thirds of the mean remuneration, up to a maximum of EUR 665 (i.e. the amount of the national minimum wage in 2021). In the specific case of self-employed workers registered as sole proprietors, who are not simultaneously employees, the maximum amount was three times the minimum wage in 2021 (i.e. EUR 1,995).
- e) Targeted population: The self-employed with an income lower than 1 IAS (i.e. EUR 438.81 in 2021). In 2020, means testing applied only to those self-employed who

were also employees. In this case, income resulting from the latter activity could not be greater than 1 IAS (i.e. EUR 438.81 in 2020). Applicants needed to demonstrate a decrease in invoicing of at least 40% in the 30 days prior to the application. Taking the number of self-employed workers in 1Q2020 as a reference, the number of eligible people was approximately 798,000.

- f) Beneficiaries: According to data issued by the GEP/MTSSS, in 2020 the benefit had a total of 255,256 recipients, 214,618 of whom were self-employed and 40,638 of whom were members of statutory bodies. The majority of the self-employed (194,597 or 90.7%) had suspended their activities, while the remainder (20,091 or 9.3%) had reduced their activities. This means that the benefit was used by roughly 27% of those self-employed who were eligible. As for the members of statutory bodies, the majority had scaled back their activities (24,288 or 59.8%), while the remainder had suspended them (16,350 or 40.2%). In 2021, the only figures available are by month. Thus, in 2021, the number of recipients was 132,307 in January (78.6% self-employed and 21.4% members of statutory bodies); 134,707 in February (76.4% self-employed and 23.6% members of statutory bodies); and 122,967 in March (76% self-employed and 24% members of statutory bodies).
- g) Novelty: This is a new measure.

2.2.4 *Trabalhadores independentes – regime extraordinário de diferimento de obrigações contributivas* (Self-employed workers – extraordinary regime for deferral of mandatory contributions)

- a) Short description of the measure: The measure consisted of the partial deferral (two thirds of the total amount) of mandatory contributions for the months of April, May and June 2020 and their subsequent payment in one of the following two ways: i) in three equal instalments, interest free, between July and September 2020; or ii) in six equal instalments, interest free, between July and December 2020. The remaining one third of the contributions had to be paid in the month originally scheduled. A similar measure was put in place for the deferral of mandatory contributions for November and December 2020 and for their subsequent payment in one of the following two ways: i) in three equal instalments, interest free, between July and September 2021; or ii) in six equal instalments, interest free, between July and December 2021.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: It was first approved in March 2020 and concerned the payment of mandatory contributions for April, May and June 2020. It was resumed in December 2020, when it concerned the payment of mandatory contributions for November and December 2020 (falling due in February 2021).
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Self-employed workers. Using the number of self-employed workers in 1Q2020 as a reference, the number of those eligible was approximately 798,000. No data on the number of applicants could be found.
- f) Beneficiaries: No data could be found.
- g) Novelty: This was a new measure.

2.2.5 *Medida extraordinária de apoio à manutenção dos contratos de trabalho em situação de crise empresarial – lay-off simplificado* (Extraordinary support for job retention in a situation of entrepreneurial crisis – simplified layoff scheme)

- a) Short description of the measure: This measure consists of a simplified version of the existing layoff scheme. Layoff became admissible for reasons of: i) total or partial closure due to legal or administrative restrictions, ii) total or partial interruption of

global supply chains, suspension or cancellation of orders, or iii) sharp and abrupt decrease in invoicing of at least 40% in the 30 days prior to the application, compared to the monthly average for the preceding 2 months or for the same period in the previous year. The measure is applied for a period of 1 month and is renewable for up to 3 months (whereas in the existing scheme the duration needed to be defined at the start and the measure lasted for a maximum of 6 months). Unlike the earlier scheme, the simplified layoff scheme does not require justification for it to be continued. During layoff, workers are protected from dismissal.

- b) Category: Conditional benefit.
- c) Timing: It was approved in late March 2020, to be in place until June 2020. In June, the government approved its extension for 1 month, until July 2020. Thus, companies that applied at the beginning could benefit from the measure for a total of 4 months. It also meant that companies that applied in June 2020 could benefit until September 2020. However, between July and December 2020, only those companies that closed on account of legal or administrative restrictions could apply for the simplified scheme. In January 2021, the measure resumed the conditions that came into force in March 2020, except for the amount of the financial support per worker.
- d) Range, duration and conditionality: In 2020, financial support per worker was 70% of two thirds of the worker's gross wage. In 2021, it is 100% of the worker's gross wage. In both cases, there was a cap of three times the minimum wage (i.e. EUR 1,995 in 2021).
- e) Targeted population: Private employers. Taking the number of workers in the private sector as a reference, roughly 4.17 million people are eligible. No data on the number of applicants could be found.
- f) Beneficiaries: In 2020, approximately 115,000 business entities and nearly 1.37 million workers received the measure – roughly 32.9% of all eligible people. From January to April 2021, 57,133 entities and 299,281 workers were recipients.
- g) Novelty: The measure concerns adjustments to a previously existing measure, covering eligibility conditions, duration and amount of the benefit.

2.2.6 *Iisenção do pagamento de contribuições associada ao lay-off (Exemption of payment of contributions associated with layoff)*

- a) Short description of the measure: The measure granted exemption from the payment of social security contributions for workers covered by the simplified layoff scheme and for members of statutory bodies (in the case of companies), and for the self-employed with employees. The exemption applied to the contributions due from the employer, but not to the contributions due from the employee or member of a statutory body.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: The measure was in place between March and September 2020.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Recipients of the extraordinary support for job retention – simplified layoff scheme (Section 2.2.5). Taking the number of workers in the private sector as a reference, there were about 4.17 million eligible people. No data on the number of applicants could be found.
- f) Beneficiaries: In 2020, approximately 115,000 entities and nearly 1.37 million workers were recipients of the measure – roughly 32.9% of eligible people.
- g) Novelty: This was a new measure.

2.2.7 *Incentivo extraordinário à normalização da atividade empresarial* (Extraordinary incentive to promote the normalisation of entrepreneurial activity)

- a) Short description of the measure: The measure consists of a financial incentive for each worker previously covered by the simplified layoff scheme, in order to incentivise entities to resume their activities.
- b) Category: Flat benefit.
- c) Timing: It came into force in July 2020 and was still in place in mid-April 2021, when this report was completed.
- d) Amount and duration: The measure consists of a financial incentive for each worker previously covered by the simplified layoff scheme, to be granted in one of two ways: i) benefit of EUR 635 (i.e. the amount of the minimum wage in 2020), paid in a single instalment; or b) benefit of EUR 1,270 (i.e. the equivalent of two minimum wages in 2020) to be paid over a period of 6 months. The second option includes two additional incentives: i) total exemption from the payment of contributions by the company for a period of 2 months if the company takes on a worker on a permanent contract in the 3 months after the incentive has ended, resulting in an actual increase in employment relative to the same period the year before; ii) a 50% reduction in the contributions due from the company: a) during the first month of support, provided this follows the company's use of the extraordinary support for job retention – layoff or the extraordinary training plan for a period up to 1 month; b) during the first 2 months of support, provided this follows the company's use of the extraordinary support for job retention – layoff or the extraordinary training plan for a period of more than 1 month but less than 3 months; c) during the first 3 months of support, provided this follows the company's use of the extraordinary support for job retention – layoff or the extraordinary training plan for a period of longer than 3 months.
- e) Targeted population: Employers who have benefited from the extraordinary support for job retention – simplified layoff scheme (Section 2.2.5).
- f) Beneficiaries: According to data issued by the GEP/MTSSS, a total of 470,982 workers had been covered by the measure up to the end of April 2021. This represents roughly 34% of the number of workers covered by the extraordinary support for job retention – simplified layoff scheme.
- g) Novelty: This was a new measure.

2.2.8 *Apoio extraordinário à retoma progressiva de atividade em empresas em situação de crise empresarial, com redução temporária do período normal de trabalho* (Extraordinary support for the progressive resumption of activity in companies in crisis that have introduced short-time working)

- a) Short description of the measure: The measure consists of financial support for the payment of the salaries of workers on short-time working. In January 2021, the benefit was extended to the members of boards of administrators of companies with employees. These administrators should have a contributions record.
- b) Category: Conditional benefit.
- c) Timing: First, the measure was in place between August and December 2020. It was then extended to the end of June 2021, and later to the end of September 2021.
- d) Range, duration and conditionality: The benefit corresponds to 100% of salary, but is capped at three times the minimum wage (i.e. EUR 1,995 in 2021). In 2020, the benefit corresponded to 70% of salary, and the remaining 30% had to be paid by the employer. If the decline in invoicing was equal to or greater than 75%, the employer could also be entitled to receive 35% of the gross wage to be paid to the employee for his/her actual working time.

- e) Targeted population: Employers with a drop in invoicing of at least 25% in the month prior to the request, relative to the corresponding period in 2020 or 2019 or the relevant average monthly income over the past 6 months. For businesses set up within the previous 24 months, the reference used is the average of the whole period of activity, apart from the last month.
- f) Beneficiaries: According to data issued by the GEP/MTSSS, a total of 387,180 workers had been covered by the measure up to 27 April 2021.
- g) Novelty: This is a new measure.

2.2.9 *Isenção ou dispensa parcial do pagamento de contribuições associada à retoma progressiva de atividade (Total or partial exemption from the payment of contributions associated with the progressive resumption of activities)*

- a) Short description of the measure: The measure consists of exemption from the payment of contributions associated with the progressive resumption of activities.
- b) Category: Flat benefit.
- c) Timing: It was first approved for the period between August and November 2020. It was later resumed for the period from 1 January to 30 September 2021.
- d) Amount and duration: Micro-, small and medium-sized employers may benefit from a reduction of 50% in their social security contributions for workers covered by the measure. In August and September 2020, they could benefit from total exemption. Large enterprises could benefit from an exemption of 50% in August and September 2020.
- e) Targeted population: Employers benefiting from the support for the progressive resumption of activities (Section 2.2.8).
- f) Beneficiaries: No data could be found.
- g) Novelty: This is a new measure.

2.2.10 *Apoio à cessação temporária das atividades de pesca das embarcações polivalentes, de arrasto costeiro e com recurso a artes de cerco (Support for temporary suspension of the fishing activities of multipurpose, coastal trawlers and purse seine fishing vessels)*

- a) Short description of the measure: The measure consisted of financial support for the shipowner and the employees of fishing vessels that had temporarily ceased their activities due to the impact of the pandemic. The temporary cessation of activities must not have lasted for more than 60 consecutive or non-consecutive days in the period between 18 March and 31 December 2020.
- b) Category: Flat benefit.
- c) Timing: The measure was introduced in May 2020 and was scheduled to be in place until 31 December 2020. However, the large number of applications and the limited budget allocation meant that the measure had to be suspended on 1 October 2020; it resumed on 2 November 2020. During this period, only compensation for a temporary halt to fishing by order of the health authorities remained effective.
- d) Amount and duration: Each employee was entitled to compensation of EUR 21.50/day. Support for the shipowner amounted to 80% of the income generated by the vessel in its fishing activities.
- e) Targeted population: Workers on a fishing vessel that had suspended its activities who had worked for at least 120 days in the 2 calendar years preceding the application or who were working on the vessel when it suspended its activities.
- f) Beneficiaries: No data could be found.

g) Novelty: This was a new measure.

2.2.11 Apoio simplificado para microempresas à manutenção dos postos de trabalho (Simplified support for micro companies to retain jobs)

- a) Short description of the measure: The measure consists of a benefit aimed at supporting micro companies to retain jobs. The benefit is paid for each worker, and the company must retain the respective jobs for at least 2 months after the end of the support.
- b) Category: Flat benefit.
- c) Timing: It was put forward in January 2021, to be in place until 30 June 2021.
- d) Amount and duration: The benefit corresponds to a fixed amount equivalent to twice the monthly minimum wage (i.e. EUR 1,330 in 2021) per worker, to be paid in equal instalments over a period of 6 months.
- e) Targeted population: Micro-employers who benefit from the extraordinary support for job retention in a situation of entrepreneurial crisis – simplified layoff scheme (Section 2.2.5) or from the extraordinary support for the progressive resumption of activities in companies in crisis that have introduced short-time working (Section 2.2.8). No estimates for the number of people targeted by the measure could be found. However, taking the total number of workers in micro companies in Portugal as a proxy, the number of eligible people could be approximately 1.8 million (about 37.5% of the employed population).
- f) Beneficiaries: No data could be found.
- g) Novelty: This is a new measure.

2.2.12 Apoio excepcional aos artesãos e às unidades produtivas artesanais (Extraordinary support for artisans and artisanal productive units)

- a) Short description of the measure: This measure consisted of financial support as a means of incentivising job retention in a sector that was affected by the cancellation of fairs and exhibitions for the promotion and sale of artisanal products.
- b) Category: Conditional benefit.
- c) Timing: It was put forward in December 2020 and was in place till 28 February 2021.
- d) Range, duration and conditionality: For artisans and units whose status was approved after 30 June 2019, financial support corresponded to 1 IAS (i.e. EUR 438.81 in 2021). For the remainder, financial support was 4 IAS (i.e. EUR 1,755.24 in 2021). If the applicant had received support in 2020 to participate in fairs and exhibitions within the scope of the programme for the promotion of arts and crafts, that amount was deducted from the support provided under this measure.
- e) Targeted population: Artisans and artisanal productive units with recognised status as such that had at least one approved application to the programme for the promotion of arts and trades between 2017 and 2020. This did not apply to artisans and units whose status was approved after 30 June 2019.
- f) Beneficiaries: According to government figures reported in the media,⁷ there were 1,180 applications, 1,120 (95%) of which were approved.
- g) Novelty: This was a new measure.

⁷ 'Covid-19: Aprovadas mais de 1.120 candidaturas ao apoio excepcional a artesãos e unidades produtivas', *Observador*, 6 April 2021, available at: <https://observador.pt/2021/04/06/covid-19-aprovadas-mais-de-1-120-candidaturas-ao-apoio-excepcional-a-artesaos-e-unidades-produtivas/>

2.3 Measures related to sickness benefits and sick pay

2.3.1 *Subsídio por doença por COVID-19 (COVID-19 sickness benefit)*

- a) Short description of the measure: This measure consists of specific rules to be applied to the sickness benefit in the event of COVID-19 infection. The amount of the benefit corresponds to 100% of the net wage – rather than ranging from 55% (for illness lasting up to 30 days) to 75% (illness lasting for over a year) of the reference pay, as is the case with ‘regular’ sickness benefit. In addition, there is no waiting period, so that the benefit is paid from day one (whereas, in the case of ‘regular’ sickness benefit there is a 3-day wait). The maximum duration of the benefit is 28 days. If the recipient has claimed this sickness benefit for the purposes of precautionary self-isolation (Section 2.3.2) immediately beforehand, the number of days used for that are deducted from the maximum duration.
- b) Category: Flat benefit.
- c) Timing: It was put in place in March 2020, and the latest legislation has extended it until 30 June 2021.
- d) Amount and duration: The amount of the benefit corresponds to 100% of the net wage – rather than ranging from 55% (for illness lasting up to 30 days) to 75% (illness lasting for over a year) of the reference pay, as is the case with ‘regular’ sickness benefit. In addition, there is no waiting period, so that the benefit is paid from day one (whereas, in the case of ‘regular’ sickness benefit there is a 3-day wait). The maximum duration of the benefit is 28 days. If the illness lasts longer, the benefit will continue to be paid under the rules of the ‘regular’ sickness benefit. The new maximum duration will also be the same as for the ‘regular’ sickness benefit. If the recipient has claimed this sickness benefit for the purposes of precautionary self-isolation (Section 2.3.2) immediately beforehand, the number of days used for that are deducted from the maximum duration.
- e) Targeted population: All those on a work contract, plus the self-employed, are included in the scheme. Taking the number of employed people provided by Statistics Portugal as a reference,⁸ the total number of people eligible in March 2020 was around 4.87 million. No data on the number of applicants could be found.
- f) Beneficiaries: According to data issued by the GEP/MTSSS, the number of recipients up to April 2021 was 561,722, or around 11.5% of those eligible.
- g) Novelty: This is an adjustment to a previously existing measure in terms of amount, duration and applicable waiting period.

2.3.2 *Subsídio por doença por isolamento profilático (Sickness benefit for reasons of precautionary self-isolation)*

- a) Short description of the measure: This measure consists of specific rules to be applied to sickness benefit in the event of precautionary self-isolation due to the risk of COVID-19 infection. A precautionary self-isolation order is issued by the health authorities following a risk assessment. The amount of the benefit corresponds to 100% of the net wage – rather than ranging from 55% (for illness lasting up to 30 days) to 75% (illness lasting for over a year) of the reference pay, as is the case with ‘regular’ sickness benefit. In addition, there is no waiting period, so that the benefit is paid from day one (whereas, in the case of ‘regular’ sickness benefit there is a 3-day wait). The sickness benefit for reasons of precautionary self-isolation has a maximum duration of 14 days.

⁸ Available at:

https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_indicadores&indOcorrCod=0009348&contexto=bd&selT=ab=tab2

- b) Category: Flat benefit.
- c) Timing: The measure was put in place in March 2020, and the latest legislation has extended it until 30 June 2021.
- d) Amount and duration: The amount of the benefit corresponds to 100% of the net wage – rather than ranging from 55% (for illness lasting up to 30 days) to 75% (illness lasting for over a year) of the reference pay, as is the case with ‘regular’ sickness benefit. In addition, there is no waiting period, so that the benefit is paid from day one (whereas, in the case of ‘regular’ sickness benefit there is a 3-day wait). The sickness benefit for reasons of precautionary self-isolation has a maximum duration of 14 days.
- e) Targeted population: Everyone on a work contracts, plus the self-employed, is included in the scheme. Taking the number of employed people provided by Statistics Portugal as a reference,⁹ the number of people eligible in March 2020 was around 4.87 million. No data on the number of applicants could be found.
- f) Beneficiaries: According to data issued by the GEP/MTSSS, the number of recipients up to April 2021 was around 683,635, or around 14% of all those eligible.
- g) Novelty: This is an adjustment to a previously existing measure in terms of amount, duration and applicable waiting period.

2.3.3 *Subsídio por doença por COVID-19 de trabalhadores do setor da saúde* (COVID-19 sickness benefit for workers in the healthcare sector)

- a) Short description of the measure: COVID-19 has been officially recognised as an occupational disease for workers in the healthcare sector. Thus, the measure consists of specific rules to be applied regarding the sickness benefit, notably in terms of the amount and maximum duration of the benefit: these are matched to those used in cases of occupational disease. Additionally, the benefit is in line with the sickness benefit due to hospitalisation, which means that the usual waiting period of 3 days is not applicable. Thus, the benefit is paid from the first day, rather than the fourth.
- b) Category: Flat benefit.
- c) Timing: The measure started in July 2020 and it was still in place at the time of writing, in mid-April 2021.
- d) Amount and duration: The amount of the benefit corresponds to 100% of the base wage, rather than 55% during the first 30 days and 60% between 31 and 90 days. The maximum duration of the benefit is 18 months, rather than 36 months. Additionally, as the benefit is in line with the sickness benefit due to hospitalisation, the usual waiting period of 3 days is not applicable. Thus, the benefit is paid from the first day, rather than from the fourth.
- e) Targeted population: Workers in the healthcare sector, both employees (all work contracts) and self-employed workers. Taking as a reference the number of people employed in the sector of health and social support (provided by Statistics Portugal),¹⁰ the number of people eligible in March 2020 was roughly 483,000. No data on the number of applicants could be found.
- f) Beneficiaries: No data could be found.
- g) Novelty: This represents an adjustment to a previously existing measure in terms of amount, duration and applicable waiting period.

⁹ Available at:

https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_indicadores&indOcorrCod=0009348&contexto=bd&selTab=tab2

¹⁰ Available at:

https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_indicadores&indOcorrCod=0009348&contexto=bd&selTab=tab2

2.4 Measures related to health insurance

2.4.1 *Proteção da saúde dos migrantes e refugiados e o seu acesso aos cuidados de saúde (Protection of migrants' and refugees' health and their access to health care)*

- a) Short description of the measure: This measure aims at facilitating the access of migrants and refugees to health care by clearly setting out that all migrants/refugees, regardless of their formal status in Portugal and/or their documentation situation, are entitled to health care during the COVID-19 pandemic. One main objective is to avoid the need for migrants and refugees to go in person to the competent services, in order to legitimise their presence in Portugal. Access to the Portuguese national health system (SNS) should be granted to every migrant/refugee who is able to present a document issued by the online Immigration and Borders Service, proving that a request or expression of interest has been made to be allowed to stay in Portugal. Such a document is also enough to register with the SNS.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: It was put forward on 8 May 2020 and was still in place at the time of writing, in mid-April 2021.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Immigrant population and refugees. No concrete estimate of the number of people eligible or of recipients could be found. In any case, it may be worth mentioning that, in 2019, there were 592,735 immigrants and refugees in Portugal (i.e. approximately 5.7% of the total population).
- f) Beneficiaries: No data could be found.
- g) Novelty: It corresponds to adjustments to previously existing provisions as regards access conditions.

2.5 Measures related to minimum income schemes and other forms of social assistance

2.5.1 *Prorrogação automática do rendimento social de inserção - RSI e do complemento solidário para idosos - CSI (Automatic continuation of benefits under the social insertion income and the solidarity supplement for the elderly)*

- a) Short description of the measure: The measure consisted of the automatic continuation of benefits under the social insertion income (RSI) and the solidarity supplement for the elderly (CSI) that were scheduled to end before 30 June 2020.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: The measure was in place between 20 March and 30 June 2020.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Recipients of the social insertion income and the solidarity supplement for the elderly scheduled to end before 30 June 2020. No data on the number of people eligible (i.e. recipients whose entitlement period was due to come to an end during the relevant timeframe) could be found. The number of recipients of the RSI and of the CSI in March 2020 was 199,897 and 164,651, respectively.
- f) Beneficiaries: According to data issued by the GEP/MTSSS, the number of beneficiaries of the automatic continuation of the RSI was 26,670, i.e. 13.3% of the number of recipients in March 2020. No data on the number of recipients of the automatic continuation of the CSI could be found.

- g) Novelty: This concerned an adjustment in terms of the period for which the benefit was granted and/or the conditions for renewal.

2.5.2 *Alteração do período de referência para o cálculo do rendimento social de inserção e do abono de família (Change in the period of reference for the calculation of the social insertion income and of child benefit)*

- a) Short description of the measure: The measure consisted of a change in the period of reference used to calculate the benefits. The income considered became the income of the previous month before the claim, rather than the income of the previous 3 months.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: The measure was in place between July and December 2020.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Recipients and potential recipients of these measures. It is not possible to provide a thorough estimate of the number of people targeted by the measure or the number of applicants.
- f) Beneficiaries: It is not possible to provide a thorough estimate of the number of recipients. In any case, data regarding the RSI show that, in the first half of 2020, there was a fall in the number of recipients, compared to the corresponding period of 2019. From July 2020, when the measure came into place, the number of recipients increased steadily, from +989 in July 2020 to +10,290 in December 2020. This latter figure represents an increase of some 5% over the figure for December 2019. By contrast, the number of recipients of child benefit in December 2020 fell compared to December 2019.
- g) Novelty: This concerned adjustments to previously existing measures in terms of the period of reference used for the calculation of the benefits.

2.5.3 *Prestação complementar de abono de família para crianças e jovens (Extra allowance of the child benefit)*

- a) Short description of the measure: This measure consisted of a one-off payment of an extra allowance of the child benefit. It was automatically granted to all recipients included in the target group.
- b) Category: Conditional benefit.
- c) Timing: The extra allowance was paid in September 2020.
- d) Range, duration and conditionality: The amount of the benefit ranged from EUR 28 for a child in the third cohort to EUR 37.46 for a child in the first cohort. The one-off extra allowance was paid in September 2020.
- e) Targeted population: Children aged under 17 on 1 January 2021 in the first three cohorts of the benefit and enrolled in education. It is not possible to provide a thorough estimate for the number of people targeted by the measure. As the extra allowance was granted automatically, there were no applicants.
- f) Beneficiaries: It is not possible to provide a thorough estimate for the number of recipients. However, in September 2020 there were in total 1.07 million recipients of the child benefit.
- g) Novelty: There is nothing new – it simply the doubling of the allowance paid in September 2020.

2.5.4 Apoio extraordinário de proteção social para trabalhador (Extraordinary social protection support for workers)

- a) Short description of the measure: The measure consisted of a means-tested monthly benefit. After the initial application, the benefit was automatically continued.
- b) Category: Flat benefit.
- c) Timing: The measure was in place between July and December 2020. It was replaced by the extraordinary support for workers' income (Section 2.5.10).
- d) Amount and duration: The amount of the monthly benefit was 1 IAS (i.e. EUR 438.81 in 2020). After the initial application, the benefit was automatically continued until December 2020. The benefit was means tested. In order to gain entitlement, the applicant's income in the month prior to the application had to be lower than the IAS.
- e) Targeted population: The measure targeted employees who ceased their professional activity and self-employed workers who had stopped, suspended or reduced their activity and who recorded a fall of at least 40% in their usual invoicing.
- f) Beneficiaries: Information from the Institute of Social Security, reported in the media suggested a total of around 17,500 recipients in November 2020.
- g) Novelty: This was a new measure.

2.5.5 Regime extraordinário de majoração das bolsas mensais dos 'contrato emprego-inserção' – CEI e 'contrato emprego-inserção+' – CEI+ (Extraordinary regime to supplement the monthly grants of 'contract employment-integration – CEI' and 'contract employment-integration+ – CEI+')

- a) Short description of the measure: The measure consists of a top-up in the amount of the monthly grant of these two benefits. Both measures address the development by unemployed people of socially necessary work to meet the temporary needs of projects promoted by public entities or by private, not-for-profit entities, for a maximum period of 12 months. In the case of CEI+, beneficiaries have to be in receipt of the social insertion income.
- b) Category: Conditional benefit.
- c) Timing: The measure was put in place on 1 April 2020 for a period of 3 months, i.e. up to the end of June 2020. It was then extended until 31 December 2020, and again until 30 June 2021.
- d) Range, duration and conditionality: For beneficiaries of CEI, the supplement to the amount of the monthly grant is 80% of the IAS (i.e. EUR 351.05 in 2020), which means that the monthly grant increases from EUR 87.76 to EUR 438.81. For beneficiaries of CEI+, the supplement is 50% of the IAS (i.e. EUR 219.41 in 2020), which means that the monthly grant increases from EUR 438.81 to EUR 658.22. The supplement lasts for the duration of the CEI or CEI+.
- e) Targeted population: Beneficiaries of CEI and CEI+ in place in public entities and in private, not-for-profit entities in the social and health sectors, particularly health centres, hospitals, long-term care units, residential homes and homecare services for the elderly or for people with disability. The CEI and/or CEI+ must be linked to situations where the entities are overstretched by the pandemic and/or by a reduction in the number of workers due to COVID-19 related illness, precautionary self-isolation or assistance for children and other dependants.
- f) Beneficiaries: It is not possible to provide a thorough estimate for the number of recipients. However, in March 2020 there were 21 recipients of CEI and 1,736 of CEI+ (professional rehabilitation).
- g) Novelty: This represents an adjustment to a previously existing measure as regards the amount.

2.5.6 *Aumento do número de destinatários do Programa Operacional de Apoio aos Mais Carenciados – POAPMC (Increase in the number of recipients of the Operational Programme of Aid to the Most Deprived, under the Fund for European Aid to the Most Deprived)*

- a) Short description of the measure: The measure increases the number of recipients of the Operational Programme for Aid to the Most Deprived (POAPMC), part of the Fund for European Aid to the Most Deprived (FEAD), for a period of 12 months. The support provided consists of food baskets that ensure 50% of the person's nutritional needs, supplemented with basic material assistance and accompanying measures aimed at raising the awareness of end recipients (for example, regarding the avoidance of food waste) and their capacity building.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: The measure was approved at the end of July 2020 and was still in place at the time of writing, in mid-April 2021.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Recipients and potential recipients of the support provided by the POAPMC (i.e. around 60,000 per month).
- f) Beneficiaries: The estimated number of recipients increased from around 60,000 per month to around 90,000 during the first 2 months and to around 120,000 during the subsequent 10 months (i.e. an increase of 50% in August and September 2020, and of 100% in the period from October 2020 to July 2021).
- g) Novelty: This is an adjustment to a previously existing measure, as regards the number of beneficiaries.

2.5.7 *Apoio à desproteção social (Support for the socially unprotected self-employed)*

- a) Short description of the measure: The measure consisted of a benefit corresponding to 50% of the IAS.
- b) Category: Conditional benefit.
- c) Timing: The measure was in place between May and December 2020. It was replaced by the extraordinary support for workers' income (Section 2.5.10).
- d) Range, duration and conditionality: The benefit corresponded to 50% of the IAS (i.e. EUR 219.41 in 2020). It could be claimed for up to 2 months (consecutive or not). By claiming the benefit, the worker committed to remaining active as a self-employed worker for a minimum of 24 months after cessation of the benefit. Additionally, eligibility was means tested, as the applicant's household income had to be lower than the benefit that the household would be entitled to within the scope of the social insertion income (RSI).
- e) Targeted population: Workers not covered by any regime of social security who declared to the tax administration the (re)commencement of their activity as a self-employed worker during the timeframe that the measure was in place.
- f) Beneficiaries: According to government figures reported in the media, around 11,000 people received the benefit.
- g) Novelty: This was a new measure.

2.5.8 Apoio extraordinário de proteção social para trabalhadores em situação de desproteção económica e social e que não tenham acesso a qualquer instrumento ou mecanismo de proteção social (Extraordinary support for the social protection of economically and socially unprotected workers without access to any instrument or mechanism of social protection)

- a) Short description of the measure: The measure consisted of a monthly benefit to be paid between July and December 2020 to economically and socially unprotected workers.
- b) Category: Flat benefit.
- c) Timing: The measure was in place between July and December 2020. It was replaced by the extraordinary support for workers' income (Section 2.5.10).
- d) Amount and duration: The measure consisted of a monthly benefit equal to 1 IAS (i.e. EUR 438.81 in 2020), paid between July and December 2020.
- e) Targeted population: Economically and socially unprotected workers. These included employees and the self-employed. Workers were considered to be economically and socially unprotected if they had ceased their professional activity between March and July 2020, without having the insurance record necessary for them to be entitled to unemployment insurance. Additionally, the self-employed were eligible if they had experienced a drop-off in invoicing of at least 40% as a consequence of the pandemic and were recipients of the extraordinary support to help with the decrease in economic activity of self-employed workers (Section 2.2.3) and if that benefit was lower than EUR 438.81 (i.e. the IAS in 2020). No data on the number of eligible people could be found. According to government figures reported in the media, up to mid-November 2020, there had been around 13,000 applications.¹¹
- f) Beneficiaries: According to government figures reported in the media, up to late November 2020, approximately 11,000 people were in receipt of the benefit (i.e. 84.6% of applicants).¹²
- g) Novelty: This was a new measure.

2.5.9 Linha de apoio social adicional aos artistas, autores, técnicos e outros profissionais da cultura (Additional social support for artists, authors and other professionals in the field of culture)

- a) Short description of the measure: The measure consisted of a one-off benefit.
- b) Category: Flat benefit.
- c) Timing: The measure was approved in August 2020 and the benefit was paid in September 2020.
- d) Amount and duration: The measure consisted of a one-off benefit of EUR 1,316.43 (i.e. 3 IAS in 2020). However, for those who were simultaneously recipients of the extraordinary incentive to stimulate professional activity (Section 2.2.2), the extraordinary support to help with the decrease in economic activity of self-employed workers (Section 2.2.3) or the support for the socially unprotected self-employed (Section 2.5.7), the amounts received through those measures in April and May 2020 were deducted from the aforementioned total amount that could be received within the scope of this measure. The benefit was paid in September 2020.

¹¹ 'Covid-19. Apoio a trabalhadores informais já teve 13 mil pedidos e começa a ser pago este mês', *Observador*, 11 November 2020, available at: <https://observador.pt/2020/11/11/covid-19-apoio-a-trabalhadores-informais-ja-teve-13-mil-pedidos-e-comeca-a-ser-pago-este-mes/>

¹² 'Segurança Social já processou pagamento de apoios a 11 mil trabalhadores sem proteção social', *Eco Sapo*, 27 November 2020, available at: <https://eco.sapo.pt/2020/11/27/seguranca-social-ja-pagou-apoios-a-11-mil-trabalhadores-sem-protecao-social/>

- e) Targeted population: Workers in the field of culture, working exclusively as self-employed, who had requested and/or received the extraordinary incentive to stimulate professional activity (Section 2.2.2), the extraordinary support to help with the decrease in economic activity of self-employed workers (Section 2.2.3) or the support for the socially unprotected self-employed (Section 2.5.7). The estimated number of people targeted by the measure was 18,000. No data on the number of applicants could be found.
- f) Beneficiaries: No data could be found.
- g) Novelty: This was a new measure.

2.5.10 Apoio extraordinário ao rendimento dos trabalhadores (Extraordinary support for workers' income)

- a) Short description of the measure: The measure consists of a benefit of variable amount and variable duration that may not be combined with other benefits linked to unemployment or to a reduction in or suspension of activity.
- b) Category: Conditional benefit.
- c) Timing: The measure was put forward in January 2021 and is scheduled to be in place until 31 December 2021.
- d) Range, duration and conditionality: The measure consists of a benefit of variable amount and variable duration that may not be combined with other benefits linked to unemployment or to a reduction in or suspension of activity. It is means tested and is capped at EUR 501.16, and has a maximum duration of 6 months (not necessarily consecutive); but there are exceptions. For former employees who are eligible for unemployment benefit, the benefit is not means tested for the first 6 months and corresponds to the amount of unemployment benefit that the person was receiving. For former employees who are not eligible for unemployment benefit, for people in professional traineeships who have become unemployed at the end of a traineeship and for economically vulnerable employees, the monthly amount is based on the differential between the benefit reference figure (EUR 501.16) and the monthly average household income per equivalent adult (using an equivalence scale that assigns a weight of 1 to the first adult, 0.7 to each subsequent adult and 0.5 to children below the age of 18). The amount cannot be higher than the net income from the prior reference salary of the unemployed person. In both cases, the benefit may last for up to 12 months. For the former self-employed, the monthly amount corresponds to the fall in the relevant average monthly income between the last quarterly declaration and the relevant average monthly income in 2019. The amount of the benefit for self-employed and domestic workers with daily or hourly working arrangements and for the economically vulnerable self-employed corresponds to two thirds of the decrease in the relevant average monthly income between the last quarterly declaration and their relevant average monthly income in 2019. For managers of micro and small companies, sole proprietors and members of the statutory bodies of foundations, associations or cooperatives, the benefit is not means tested for the first 6 months, and its amount corresponds to the remuneration registered as the contribution base if that amount is lower than 1.5 times the IAS, i.e. lower than EUR 658.22 (1.5*EUR 438.81) in 2021, or to two thirds of the remuneration registered as the contribution base if that amount is equal to or higher than 1.5 IAS. The cap in these cases is three times the monthly minimum wage, i.e. EUR 1,995 (3*EUR 665) in 2021. Overall, considering the specific rules that apply to each of the six groups, the minimum monthly amount of the benefit is EUR 50 if income loss is lower than 0.5 IAS. If income loss is between 0.5 IAS and 1 IAS, the minimum should correspond to 50% of the loss. If income loss is greater than 1 IAS, the minimum is 0.5 IAS.
- e) Targeted population: The measure targets six different groups. The first group consists of former employees, former self-employed and former members of boards

of administrators who have become unemployed and whose unemployment benefit ends after 1 January 2021. The second group comprises former employees, former economically dependent self-employed persons and former members of boards of administrators who are not eligible for unemployment benefit. They must have become unemployed for reasons that cannot be attributed to them and should have a contributions record of at least 3 months in the 12 months prior to unemployment. The third group targeted by the measure are self-employed and domestic workers with daily or hourly working arrangements. They should cumulatively have a contributions record of at least 3 months in the 12 months prior to the application, have suffered a fall in average monthly income of more than 40% in the period between March and December 2020, compared to the corresponding period in 2019, and a fall in income of more than 40% between the last quarterly income declaration available and their relevant average monthly income in 2019. The fourth target group are economically vulnerable workers, not included in previous categories, who are registered as self-employed with the social security and who maintain this link while receiving the support and for the following 30 months. The fifth group consists of people who have been in professional traineeships and have become unemployed at the end of the traineeship. Finally, the sixth group includes managers of micro and small companies (i.e. companies with fewer than 10 and 50 workers, respectively), sole proprietors and members of statutory bodies (e.g. board of administrators, board of trustees, etc.) of foundations, associations or cooperatives. These beneficiaries should have a contributions record of at least 3 consecutive months or 6 non-consecutive months in the 12 months prior to the request, and should be working in an entity or sector demonstrably affected by COVID-19 related suspension of activity. Alternatively, recipients in this sixth group should demonstrate, through both a self-declaration and a certificate issued by a certified accountant, a fall of at least 40% in invoicing in the 30 days prior to the application, compared to the monthly average of the previous 2 months or the equivalent period in 2020. For entities set up less than 12 months before, the reference used should be the average of the whole period of activity. According to government figures reported in the media,¹³ the benefit is expected to reach around 250,000 workers, i.e. 4.8% of the active population.

- f) Beneficiaries: According to data issued by the GEP/MTSSS, the number of applications in 2021 was 59,127 in January, 40,040 in February and 39,207 in March. The media do not provide details on the type of calculations made by the government. If the target mentioned above refers to a monthly basis, then in those 3 months the measure reached a minimum of 15.7% and a maximum of 23.7% of the target. If the target mentioned above refers to a yearly basis (the timeframe foreseen for the measure), then the measure reached 55.3% of the target during the first quarter of 2021.
- g) Novelty: The measure alters, replaces and combines a set of measures in place in 2020 into one single measure.

2.6 Measures related to housing support

2.6.1 *Regime extraordinário de proteção dos arrendatários (Extraordinary scheme for the protection of tenants)*

- a) Short description of the measure: This measure suspends a landlord's right to enforce the end date of a rental agreement (unless the tenant has no objections), as well as a landlord's ability to break a rental agreement or oppose its renewal. It also suspends the legal period leading to eviction (6 months) if this occurs while the

¹³ 'Trabalhadores podem pedir novo apoio extraordinário', *JN*, 27 January 2021, available at: <https://www.jn.pt/economia/trabalhadores-podem-pedir-novo-apoio-extraordinario-13281335.html>

measure is in place. In order to be eligible for the measure, tenants should be up to date with their rent payments.

- b) Category: Neither flat nor conditional benefit.
- c) Timing: The measure was launched in March 2020 and has been extended until the end of June 2021.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Tenants of lease contracts for residential and non-residential purposes.
- f) Beneficiaries: No data could be found.
- g) Novelty: This is a new measure.

2.6.2 Regime excepcional para as situações de mora no pagamento da renda devida nos termos de contratos de arrendamento urbano (Moratorium on the payment of housing rents)

- a) Short description of the measure: This measure consists of a moratorium on the payment of housing rents, and a loan that may be granted by the Institute for Housing and Urban Rehabilitation (IHRU). Under the latest revision, of 30 December 2020, it also includes grant assistance.
- b) Category: Conditional benefit.
- c) Timing: The measure was initially put in place in April 2020 and was extended until the end of June 2021.
- d) Range, duration and conditionality: For **landlords** to be eligible, they had demonstrate that their monthly income had declined to less than the IAS (i.e. EUR 438.81 in 2020) due to a fall in rental income of more than 20% (relative to the previous month or the same period of the previous year) caused by the non-payment of rent by their tenants. For landlords, the loan was available interest free, and corresponded to the value of the rents lost. For **tenants** to be eligible, they need to demonstrate a loss of household income of more than 20%, relative to the previous month or the same period of 2019. Under the latest revision (30 December 2020), February 2020 may be used as the reference period. Tenants also need to demonstrate a 'housing effort rate' of more than 30% (35% up to December 2020). The latest revision allows low-income borrowers who can demonstrate a housing effort rate of between 35% and 100% to apply for part of the loan to be converted into a grant (i.e. they can ask to be exempted from repaying part of the loan). The part of the loan to be considered is calculated according to the following formula: $\text{grant assistance} = \text{loan} \times (1 - 35\% / \text{effort rate})$. Low-income borrowers who demonstrate a housing effort rate of above 100% may ask for the total loan to be converted into grant assistance. To qualify as a low-income borrower, their equivalised average monthly household income should meet the threshold for access to the '1.º Direito' programme, i.e. be lower than 4 IAS (EUR 1,755.24 in 2021). Also, according to the latest revision, tenants who demonstrate a loss of household income of between 25% and 40% may request grant assistance equivalent to 30% of the rent, up to EUR 1,200/month. Tenants who demonstrate a loss of household income of over 40% may request grant assistance equivalent to 50% of the rent, up to EUR 2,000/month.
- e) Targeted population: Up until December 2020, the loan element of the measure targeted tenants and landlords with a regular rental contract, but the moratorium targeted only tenants. From January 2021, landlords are no longer targeted.
- f) Beneficiaries: No data could be found.
- g) Novelty: This is a new measure.

2.6.3 *Garantia de acesso aos serviços essenciais* (Guarantee of access to essential services)

- a) Short description of the measure: The measure prohibits the interruption of the supply of water, electricity, natural gas and electronic communications. Clients may also request the unilateral cessation of telecommunication contracts without the need to compensate the supplier. Payment of arrears for the period April –September 2020 was to be made according to a payment schedule agreed between the client and the supplier, to be initiated in November 2020. Payment of arrears for 2021 should also be made according to a payment plan agreed between the client and the supplier, but no timeframe is stipulated. If, between October and December 2020, companies interrupted the services, the clients could request their reactivation without any costs, so long as they remained eligible throughout the period and a payment plan was established.
- b) Category: Neither flat nor conditional benefit.
- c) Timing: The measure was in place between April and September 2020. In January 2021, the measure was resumed for the first half of 2021.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Consumers of these services. In the case of electronic communications, entitlement was limited to households that missed payments due to COVID-19 infection, to unemployment or to a fall in household income of at least 20%.
- f) Beneficiaries: No data could be found
- g) Novelty: This is a new measure.

2.7 Leave for parents whose children are unable to attend school or a pre-school service by reason of COVID-19

2.7.1 *Apoio excepcional à família* (Extraordinary support for families)

- a) Short description of the measure: This measure allows the justified absence from work of parents of children aged below 12 (no age limit in case of disability or chronic illness) whose school has been closed by decision of the government or the health authority. It also includes an allowance to compensate the worker for the loss of income from work. The support cannot be granted to both parents simultaneously. Legislation specifies that the leave should last for the number of days actually needed.
- b) Category: Conditional benefit.
- c) Timing: It was put forward in March 2020 and was still in place at the time of writing, in mid-April 2021.
- d) Range, duration and conditionality: The monthly benefit corresponds to one third of the base wage for the self-employed and two thirds of the base wage in the case of employees. The amount ranges from a minimum of EUR 438.81 (i.e. 1 IAS in 2020, in the case of the self-employed) or EUR 635 (i.e. the national minimum wage in 2020, in the case of employees) to a maximum of EUR 1,097.03 (i.e. 2.5 times the IAS, in the case of the self-employed) or EUR 1,905 (i.e. three times the minimum wage, in the case of employees). The benefit should be paid on the basis of the actual number of days of absence from work.
- e) Targeted population: Everyone on a work contract, as well as the self-employed, is included in the scheme. Working parents in both the private and the public sector are eligible. Initially, those working from home were not eligible. But as from February 2021, those working from home are eligible, if they choose to stop working in order to support their families and so long as they fall into one of the following categories

of household: i) lone-parent household, ii) household with at least one child attending early childhood education and care or primary education, iii) household with at least one person of any age with disability and proven incapacity of at least 60%. According to media reports,¹⁴ the government expected to reach around 750,000 people (i.e. all households with children below 12). No data on the number of applicants could be found.

- f) Beneficiaries: According to data issued by the GEP/MTSSS, in 2020 the leave was used by over 200,000 workers – 179,405 employees, 18,879 self-employed and 2,365 domestic workers (i.e. 26.8% of the target). In all cases, the vast majority were women – 81.3%, 77.1% and 99.5%, respectively. On average, the leave lasted for 19, 20 and 21 days, respectively. In 2021, no total figures are available – only by month. Thus, in 2021, the measure had 68,320 recipients in January, 103,373 in February and 89,258 in March.
- g) Novelty: This represents an adjustment to a previously existing measure in terms of scope.

2.7.2 *Assistência a filho ou neto por isolamento profilático (Assistance for children or grandchildren for reasons of precautionary self-isolation)*

- a) Short description of the measure: This measure grants the right to be absent from work for a maximum of 14 days and a related benefit to cover the loss of remuneration resulting from absence from work.
- b) Category: Conditional benefit.
- c) Timing: It was put forward in March 2020 and was still in place at the time of writing, in mid-April 2021.
- d) Range, duration and conditionality: The benefit corresponds to 100% of the net wage, in the case of parents, or 65% in the case of grandparents. It has a maximum duration of 14 days.
- e) Targeted population: Parents or grandparents of children aged below 12 (no age limit in case of disability or chronic illness) who need to be in precautionary self-isolation. All work contracts are included, but the self-employed are excluded. No eligibility conditions are mentioned.
- f) Beneficiaries: According to data issued by the GEP/MTSSS, up to the end of April 2021 there had been 91,078 recipients of the measure, the vast majority of whom were women (84.5%).
- g) Novelty: This consists of an adjustment to a previously existing measure in terms of scope.

2.8 Other important temporary social protection/inclusion measures adopted in the context of the pandemic, which do not fall into any of the categories listed in the previous sections

2.8.1 *Medidas excecionais de proteção dos créditos (Exceptional measures for the protection of credits)*

- a) Short description of the measure: The measure consists of a moratorium on debt repayments.
- b) Category: Neither flat nor conditional benefit.

¹⁴ 'Só 23% dos pais pediram apoio por causa do fecho das escolas na primavera. O que torna a medida pouco atrativa?', *Eco Sapo*, 22 January 2021, available at: <https://eco.sapo.pt/2021/01/22/so-23-dos-pais-pediram-apoio-na-primavera-o-que-torna-a-medida-pouco-atrativa/>

- c) Timing: The measure was approved in late March 2020 and was to have been in place until September 2020. In June 2020, it was extended to 31 March 2021. The extension for beneficiaries was automatic, unless the beneficiary refused it before 20 September 2020. New applications had to be made by 30 June 2020. In December 2020, the measure was extended until 30 September 2021, and a new deadline for applications was set at 31 March 2021.
- d) Amount and duration/range, duration and conditionality: Not applicable.
- e) Targeted population: Individuals residing in Portugal and in at least one of the following situations: i) benefiting from COVID-19 sickness benefit (Section 2.3.1), in precautionary self-isolation (Section 2.3.2) or paying assistance to look after children or grandchildren (Section 2.7.2); ii) having been laid off (Section 2.2.5) or having had their working hours reduced; iii) unemployed and registered with the public employment services; iv) eligible for the extraordinary support to help with the decrease in economic activity of self-employed workers (Section 2.2.3); v) working for entities closed by decision of the government during the state of emergency. The measure was revised in June 2020. Its target group was widened by including individuals with residence outside Portugal (the decree law specifically mentions the objective of covering emigrants) and people experiencing a temporary decrease in household income of at least 20% as a result of the pandemic. No data on the number of people eligible could be found. According to the latest data issued by the Bank of Portugal, the number of applicants up to 30 September 2020 was 812,214.
- f) Beneficiaries: According to the latest data issued by the Bank of Portugal (30 September 2020), the number of approvals was 751,725 (i.e. 92.6%). Households represented 71.2% of the total number of recipients (i.e. 535,393). Some 317,606 concerned housing credits (42%) and 217,787 (29%) concerned credit for consumption (individuals). The remaining 216,332 (29%) concerned credit for entities. According to the latest financial stability report issued by the Bank of Portugal in December 2020, by September 2020 19% of all housing credits had been included in the moratorium, as well as 19% of all personal credits and 6% of car purchase credits.
- g) Novelty: This is a new measure.

3 Social protection and inclusion responses to the crisis: overall assessment and possible gaps

This third section briefly considers three aspects: the expected cost of the social protection and inclusion measures put in place by the country (Section 3.1), the impact of these measures on the social protection system and on social inclusion policies (Section 3.2), and the possible remaining gaps in the social protection system and in social inclusion policies (Section 3.3). It concludes with a section (3.4) on debates and recommendations.

3.1 Expected cost of social protection and inclusion measures

On 16 March 2020, the Minister of Labour and Social Security anticipated that the cost of measures aimed at supporting families and job protection would be around EUR 2 billion per month.¹⁵ That would mean a total of around EUR 18 billion up to mid-December 2020. At the time, the only concrete estimate was for the extraordinary support for families (Section 2.7.1), which was expected to cost EUR 294 million.

¹⁵ 'Governo: medidas de apoio à família e ao trabalho com custo de 2 mil ME/mês', *Diário de Notícias*, 16 March 2020, available at: <https://www.dn.pt/poder/governo-antecipa-impacto-de-2-mil-me-por-mes-com-medidas-de-apoio-a-familia-e-ao-trabalho--11939550.html>

According to the Portuguese government,¹⁶ the total cost of COVID-19 related measures in all areas between 4 March and 10 December 2020¹⁷ was over EUR 22 billion, EUR 2.79 billion of which concerned non-repayable grants. The same government communication spoke of a total of EUR 1.7 billion spent on measures to protect jobs and EUR 3.9 billion on measures for tax and contributory relief. The total amount linked to the moratorium on debt repayments (including the estimated amount up to September 2021) was EUR 6.1 billion. It should be borne in mind that this does not refer to money spent, but rather concerns the deferral of payments.

The latest budget outturn issued by the Portuguese budget directorate-general in January 2021 (DGO, 2021) depicts the 'budgetary impact of COVID-19 policy measures' up to December 2020 (Table A1, in the annex). It should be pointed out that the totals per measure included in the table are those indicated in the budget outturn, but that the totals by policy area are aggregations made by the author of this report and reflect only those measures indicated in the document. They should, therefore, be interpreted with caution.

The measures adopted by Portugal to deal with the social consequences of the COVID-19 pandemic in 2020 depicted in Table A1 amount to around EUR 1.95 billion, most of which (EUR 1.6 billion or 82.3%) went on measures to protect jobs, provided through support for employers, employees and the self-employed.

According to Eurostat [tec00001], Portuguese GDP in 2019 stood at EUR 213.3 billion. This means that the total cost of the measures represents around 0.9% of Portugal's GDP in 2019, and the total cost of the job-protection measures provided through support to employers, employees and the self-employed represents around 0.75% of Portugal's 2019 GDP.

3.2 Impact on the social protection system and on social inclusion policies

The social protection system and social inclusion policies in Portugal have provided a wide range of responses to the COVID-19 pandemic. Over 30 different measures are outlined in Section 2 of this report. On a less positive note, this serves to highlight the inability of what was already in place to provide an adequate response in the crisis. Moreover, bridging the existing gaps seems to have led to the adoption of 'band-aid measures' in many relevant areas, rather than a comprehensive framework to tackle the pandemic crisis.

Furthermore, with regard to most of the measures, information on the number of people targeted, the number of applicants and/or the number of recipients is either lacking or incomplete. Moreover, existing information seems to indicate that some of the measures on the extensive list addressed very few people – for example, in the case of the reduction in insurance periods for access to unemployment insurance and to the benefit for termination of activity (600 people) and the extraordinary regime to supplement the monthly grants of CEI (21 people).

It should also be stressed that none of the measures implemented have become more permanent. Moreover, many pieces of legislation approving the measures are keen to emphasise that they are exceptional and/or temporary, and indeed several of the measures were approved for a given period of time and then extended as the pandemic dragged on. In a few cases, implementation of the measures was even interrupted and then resumed as the pandemic surged in late 2020. Thus, currently it does not seem possible to clearly assess the extent to which the measures put in place in response to the crisis will contribute to reshaping the social protection system and social policies in

¹⁶ Available at: <https://www.portugal.gov.pt/download-ficheiros/ficheiro.aspx?v=%3d%3dBQAAAB%2bLCAAAAAAABAAzNLA0NqQAnVHJAUAAAA%3d>

¹⁷ However, the figures presented regarding the bank moratoria are estimates that also include the period up to September 2021.

Portugal. In any case, it does not seem likely at this point that the exceptional and temporary measures will become permanent.

3.3 Remaining gaps in the social protection system and social inclusion policies

A major issue in Portugal relates to the fact that in recent years, and largely because of the financial constraints, the social protection system and social inclusion policies have become embedded in a policy perspective that narrows the scope of public policies to focus on the 'most disadvantaged' and on providing support that does not seek to lift recipients above the poverty threshold.

The RSI, for instance – even if it has potential to mitigate the intensity and severity of poverty – will hardly have a decisive impact on poverty reduction, as has been recognised by various authors and studies (e.g. Rodrigues et al., 2016) and by the European Commission in its latest country reports for Portugal (e.g. EC, 2020a).

As regards pensions Perista et al. (2020: 53) noted that 'neither the benefit amounts of the minimum pension nor of the social pension provide an income allowing the elderly's income to rise above the poverty threshold. The implementation of the CSI aimed precisely at ensuring that the elderly's income based on very low pensions would rise to a level close to the poverty threshold.'

Similar considerations apply to the minimum wage. The latest report by the Observatory for the Fight against Poverty in the city of Lisbon noted that 'even if the poorly remunerated labour market integration of a large share of workers improves the family's economic situation, it is not enough to pull them out of poverty' (Costa et al., 2017: 230). This was seconded by Perista et al. (2020: 10), who emphasised that 'even after the revisions, the minimum wage only "pulls people out of poverty" if the worker is a single-person or a lone-parent household with one child. Similarly, it is not sufficient to lift a two-adult household with one child, for example, out of poverty.'

Additionally, housing affordability remains an issue (Perista, 2019; Perista et al., 2020), leading to the necessity to introduce the measures described in Section 2.6. The European Commission has addressed this issue, emphasising that 'housing affordability ... is fast becoming a new social challenge' (EC, 2020a: 7) and that 'the increase in house prices, which started as a correction from previously low levels of valuation, has resulted in historically high price levels' (EC, 2020c: 10), thus drawing attention to the need for close monitoring.

The European housing exclusion index, released by the Abbé Pierre Foundation and FEANTSA, highlights the fact that 'prices started booming again from 2014 and their increase was among the strongest in Europe in 2018 (9.5%)' (Abbé Pierre Foundation/FEANTSA, 2019: 93). The report also highlights a paradox regarding what may be the unmet need for affordable housing in Portugal: 'price indicators (housing cost overburden rate, total housing costs) remain below the European average in Portugal, despite more than one quarter of poor households being overburdened by housing costs and an increase between 2007 and 2017 of the number of households in arrears' (Abbé Pierre Foundation/FEANTSA, 2019: 96).

This report further emphasises that indeed Portugal was one of the countries where housing costs among poor households increased the most (by 39.6%) between 2010 and 2016. In 2017, the share of poor households overburdened by housing costs stood at 26%, compared with 2.4% of non-poor households.

3.4 Debates and recommendations

Even if the topic is not in the media spotlight, the pandemic crisis has spurred debate regarding the way in which social inclusion and social protection are conceived in Portugal. Some stakeholders, including political parties and the relevant non-governmental organisations, claim that there is room to address the immediate effects of

the pandemic, while at the same time contributing to a structural solution to poverty in Portugal. This could be framed within – or at least could be considered in parallel with – the ongoing elaboration of the Portuguese national strategy for fighting poverty and the creation, in October 2020, of the coordinating commission responsible for its drafting.

Particularly left-wing opposition parties – and most notably the Left Bloc (Bloco de Esquerda – BE) – have criticised the Portuguese government, claiming that measures of social protection tend to provide financial support that does not lift people over the poverty threshold. As a way of addressing this criticism, one of the latest measures approved – the extraordinary support for workers' income (Section 2.5.10), which replaces and combines a set of measures in place in 2020 into one single measure – uses the poverty threshold as reference figure for the measure. According to the latest Eurostat figure, the 2019 at-risk-of-poverty threshold (income reference year 2018) was EUR 6,014/year (i.e. EUR 501.17/month). In any case, the BE and the Confederation of Portuguese Workers (Confederação Geral dos Trabalhadores Portugueses – Intersindical Nacional – CGTP-IN) consider that the measure's means testing is very restrictive, and even more restrictive than the means testing for the benefits in place in 2020, thus excluding a large number of vulnerable people.

Additionally, the BE has described the benefit as another time-limited extraordinary benefit, rather than a new social benefit, as was originally announced. As mentioned above (Section 3.2), very many pieces of legislation approving the measures are keen to emphasise that they are exceptional and/or temporary.

In order to address in-work poverty, which typically affects around 30% of the poor in Portugal, the former government's programme (2015–2019) included the goal of creating an annual income supplement through a tax credit, with the aim of increasing the income of low-wage households. The supplement would be means tested and would take into account household composition; it would be 'an additional mechanism in the fight against poverty, as well as an incentive for labour market integration, as it only regards those declaring labour income' (Republic of Portugal, 2015: 238).

Government representatives originally indicated that the measure would be introduced in 2018. However, that government took no steps to do so, and nor has the following administration, run by the same political party for the term 2019–2023; and indeed, the measure has not been included in the major planning options of recent years.

The situation is similar with regard to the creation of a social tariff for internet access. This goal is included in the current government's programme (2019–2023) and there were indications from government officials that it would be created in 2020. It would consist of a cash discount for economically vulnerable households. However, the social tariff has not yet been created, and the measures taken to address the effects of the pandemic have focused rather on preventing any interruption in the supply of essential services, including electronic communications – payments due have to be made in full at a later stage (Section 2.6.3). This scenario has raised additional criticism, as other COVID-19 related measures have strongly encouraged (or even imposed) working from home, while, in two different periods, school classes were transferred to online platforms.

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Annex

Table A1: Cost of measures (selection) adopted by Portugal to tackle the social consequences of the COVID-19 pandemic in 2020, by policy area

Sections		EUR million	% GDP
2.1	Measures related to unemployment benefits	54.1	0.025
2.1.1	Prorrogação automática de subsídios de desemprego (Automatic continuation of unemployment benefits)	53.8	0.025
2.1.2; 2.1.3	Subsídio de desemprego e Subsídio por cessação de atividade - Redução dos prazos de garantia (Reduction in insurance periods for access to unemployment insurance and to the benefit for termination of activity) / Redução do número de dias de trabalho por conta de outrem, com o correspondente registo de remunerações, necessário para o acesso ao subsídio social de desemprego (Reduction in the number of workdays as an employee, with corresponding contribution payment, needed for access to unemployment assistance)	0.3	---
2.2	Measures of job protection provided through support to employers, employees and the self-employed	1,604.3	0.752
2.2.1	Complemento de Estabilização (Stabilisation supplement)	58.3	0.027
2.2.3	Apoio Extraordinário à redução da atividade económica de trabalhador independente (Extraordinary support to help with the decrease in economic activity of self-employed workers)	280.0	0.013
2.2.5	Medida Extraordinária de Apoio à Manutenção dos Contratos de Trabalho em situação de crise empresarial – Layoff simplificado (Extraordinary support for job retention in a situation of entrepreneurial crisis – simplified layoff scheme)	823.2	0.386
*	Apoios ao emprego - inclui complementos layoff (Employment support – includes layoff supplements)	32.3	0.015
2.2.7	Incentivo extraordinário à normalização da atividade empresarial (Extraordinary incentive to promote the normalisation of entrepreneurial activity)	284.1	0.133
2.2.8	Apoio extraordinário à retoma progressiva de atividade em empresas em situação de crise empresarial, com redução temporária do período normal de trabalho (Extraordinary support for the progressive resumption of activity in companies in crisis that have introduced short-time working)	158.7	0.074
2.3	Measures related to sickness benefits and sick pay	105.8	0.050
2.3.1	Subsídio por doença por COVID-19 (COVID-19 sickness benefit)	40.9	0.019
2.3.2	Subsídio por doença por isolamento profilático (Sickness benefit for reasons of precautionary self-isolation)	62.6	0.029

2.3.3	Prestações por doenças profissionais (COVID-19 sickness benefit for workers in the healthcare sector)	2.3	0.001
2.5	Measures related to minimum income schemes and other forms of social assistance	93.6	0.044
2.5.1	Prorrogação automática do rendimento social de inserção - RSI (Automatic continuation of benefits under the social insertion income and social solidarity for the elderly)	5.8	0.003
2.5.3	Apoios sociais às famílias (Extra allowance of the child benefit)	63.4	0.030
2.5.4	Apoio extraordinário de proteção social para trabalhador (Extraordinary social protection support for workers)	21.8	0.010
2.5.7	Apoio à desproteção social (Support for the socially unprotected self-employed)	2.6	0.001
2.6	Measures related to housing support		
2.6.2	Regime excecional para as situações de mora no pagamento da renda devida nos termos de contratos de arrendamento urbano (Moratorium on the payment of housing rents)	1.2	---
2.7	Leave for parents whose children are unable to attend school or a pre-school service by reason of COVID-19	89.9	0.042
2.7.1	Apoio excecional à família (Extraordinary support for families)	82.9	0.040
2.7.2	Assistência a filho ou neto por isolamento profilático (Assistance for children or grandchildren for reasons of precautionary self-isolation)	7.0	0.003
Grand total		1,948.9	0.9%

* It is uncertain what is included under this heading. In any case, it should include at least the measure included in Section 2.2.6 – Exemption of payment of contributions associated with layoff (Isenção do pagamento de contribuições associada ao lay-off).

Source: Own elaboration on the basis of DGO (2021: 12).

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