



European Social  
Policy Analysis  
Network (ESPAN)

# Access for children in need to the key services covered by the European Child Guarantee

Portugal

Pedro Perista

Social Europe



**EUROPEAN COMMISSION**

Directorate-General for Employment, Social Affairs and Inclusion  
Directorate D — Social Rights and Inclusion  
Unit D.2 — Social Protection

*Contact:* Flaviana Teodosiu

E-mail: [flaviana.teodosiu@ec.europa.eu](mailto:flaviana.teodosiu@ec.europa.eu)

*European Commission*  
*B-1049 Brussels*

EUROPEAN SOCIAL POLICY ANALYSIS NETWORK (ESPAN)

# **Access for children in need to the key services covered by the European Child Guarantee**

## **Portugal**

Pedro Perista

Manuscript completed in March 2023

This document has been prepared for the European Commission however it reflects the views only of the authors, and the European Commission is not liable for any consequence stemming from the reuse of this publication. More information on the European Union is available on the Internet (<http://www.europa.eu>).

Luxembourg: Publications Office of the European Union, 2023

© European Union, 2023



The reuse policy of European Commission documents is implemented based on Commission Decision 2011/833/EU of 12 December 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39). Except otherwise noted, the reuse of this document is authorised under a Creative Commons Attribution 4.0 International (CC-BY 4.0) licence (<https://creativecommons.org/licenses/by/4.0/>). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.

For any use or reproduction of elements that are not owned by the European Union, permission may need to be sought directly from the respective rightholders.

**Quoting this report:** Perista, P. (2023) *Access for children in need to the key services covered by the European Child Guarantee – Portugal*. European Social Policy Analysis Network, Brussels: European Commission.

## Table of contents

<b>Summary .....</b>	<b>5</b>
<b>Introduction.....</b>	<b>6</b>
<b>1. Early childhood education and care (ECEC).....</b>	<b>7</b>
1.1 Mapping accessibility and affordability of ECEC .....	7
1.1.1 Conditions for qualifying as a “low-income child” .....	8
1.1.2 Relation between the group(s) of children who have free access and the AROPE population of children in the relevant age group(s) .....	9
1.2 Main barriers to effective and free access to ECEC for low-income children	10
1.2.1 Financial barriers .....	10
1.2.2 Non-financial barriers.....	10
1.3 Free meals provision for low-income children in ECEC .....	10
<b>2. Education and school-based activities .....</b>	<b>11</b>
2.1 Mapping the main school costs in public primary and secondary education .	11
2.1.1 Conditions for qualifying as a “low-income child” .....	12
2.1.2 Relation between the group(s) of children who have free access and the AROPE population of children in the relevant age group(s) .....	12
2.2 Cash benefits whose specific purpose is to help meet educational costs .....	12
2.3 Main barriers to effective and free access to school-based activities for low- income children.....	14
2.3.1 Financial barriers .....	14
2.3.2 Non-financial barriers.....	14
<b>3. Free meals at school .....</b>	<b>14</b>
3.1 Mapping free provision of school meals.....	14
3.1.1 Conditions for qualifying as a “low-income child” .....	14
3.1.2 Relation between the group(s) of children who have free access and the AROPE population of children in the relevant age group(s) .....	15
3.2 Main barriers to effective and free access to school meals for low-income children .....	15
3.2.1 Financial barriers .....	15
3.2.2 Non-financial barriers.....	16
<b>4. Healthcare .....</b>	<b>16</b>
4.1 Mapping the provision of free healthcare services and products .....	17
4.1.1 Conditions for qualifying as a “low-income child” .....	17
4.1.2 Relation between the group(s) of children who have free access and the AROPE population of children in the relevant age group(s) .....	17
4.2 Cash benefits whose specific purpose is to help meet healthcare costs.....	17
4.3 Non-financial barriers to effective and free access to healthcare.....	18
<b>5. Healthy nutrition .....</b>	<b>19</b>

5.1	Main barriers to effective access to healthy nutrition .....	19
5.1.1	Financial barriers .....	19
5.1.2	Non-financial barriers.....	20
5.2	Publicly funded measures supporting access to healthy nutrition .....	21
<b>6.</b>	<b>Adequate housing .....</b>	<b>21</b>
6.1	Publicly funded measures supporting access to adequate housing – Housing allowances .....	21
6.2	Publicly funded measures supporting access to adequate housing – Social housing .....	23
6.2.1	Mapping the provision of social housing .....	23
6.2.2	Main barriers to effective access to social housing.....	24
6.3	Publicly funded measures supporting access to adequate housing – Other measures .....	24
	<b>References .....</b>	<b>26</b>

## Summary

On 14 June 2021, the Council of the European Union adopted a Recommendation establishing a “European Child Guarantee”, with a view to guaranteeing access to six key services for “children in need”:

- effective and free access to four services: high-quality early childhood education and care; education and school-based activities; at least one healthy meal each school day; and healthcare; and
- effective access to two services: healthy nutrition and adequate housing.

The purpose of the present report is to assess the extent to which low-income children in Portugal do indeed have effective (or effective and free) access to these services.

Changes in access to childcare in Portugal are underway. By September 2024, all publicly organised childcare in Portugal will be free of charge for families. This represents a major step forward, but the process has not been free from upsets. Public pre-schooling is free for all children from age 3. However, only children aged 4 or over are legally entitled to use it. Meals are provided for free only to children in the first income band of child benefit.

Parents are exempt from most costs in public primary and secondary education in Portugal. Support for basic school materials and for extramural activities is provided. However, it is not available to all low-income children, and the amounts provided are clearly insufficient – especially in the face of the recent escalation in inflation. Another barrier is the fact that exercise books that are part of the same package as textbooks are not provided for free.

Only children in the first income band of child benefit receive school meals free of charge. Another barrier – experienced by all children – is the reported overall low quality of the service, resulting from using price as the sole criterion for selecting service-providers.

Most healthcare costs in Portugal are waived for all children. However, prescribed medicines and some vaccines are not free. Out-of-pocket health expenses are high in Portugal, and are not compensated for by cash benefits, probably leading the most vulnerable population to have unmet medical needs. In addition, some non-financial barriers persist, such as the large number of patients without an assigned general practitioner, and long waiting times. Furthermore, geographical imbalances also persist.

The major barrier hindering access for low-income children to healthy meals in Portugal is low salaries, which also lead to low mean amounts of social transfers. Access for low-income children to healthy meals is likely to become more difficult with rising inflation, especially in the price of food. Additionally, there are indications that low health literacy (including in relation to nutrition) is more evident among the most vulnerable population.

In Portugal there are currently no national housing benefits/allowances that would specifically help low-income households with children to cover their housing costs, but support is provided through energy social tariffs. The criteria for priority access to social housing are established by each municipality. Households with children sometimes have priority. Recent initiatives in the field of housing seem to be aimed at improving traditionally weak state investment in the housing field, which has so far failed to adequately respond to the housing needs of many low-income households.

## Introduction

On 14 June 2021, the EU Member States unanimously adopted the Council Recommendation (EU) 2021/1004 establishing a “European Child Guarantee” (ECG).<sup>1</sup>

The objective of the ECG is to offset the impact of poverty on children and to prevent and combat their social exclusion. To this end, it is recommended that Member States guarantee for “children in need” (defined as people **under 18** who are at risk of poverty or social exclusion – AROPE):

- effective and free access to four services: high-quality early childhood education and care (ECEC); education and school-based activities;<sup>2</sup> at least one healthy meal each school day; and healthcare; and
- effective access to two services: healthy nutrition and adequate housing.

According to the ECG Recommendation, **effective access** means “a situation in which services are readily available, affordable, accessible, of good quality, provided in a timely manner, and where the potential users are aware of their existence, as well as of entitlements to use them” (Article 3d). **Effective and free access** means “effective access” to the services, as well as free-of-charge provision – either by organising and supplying such services or by providing “adequate benefits to cover the costs or the charges of the services, or in such a way that financial circumstances will not pose an obstacle to equal access” (Article 3e).

The Recommendation directs the Member States to prepare action plans, covering the period until 2030, to explain how they will implement the Recommendation.<sup>3</sup> These plans are to be submitted to the European Commission.

The purpose of the present report is to assess the extent to which children AROPE have effective and free access to four of the six services covered by the ECG and effective access to the other two (see above). Given that the eligibility criterion (or criteria) for accessing those services in individual Member States (at national and/or sub-national level, depending on how the service is organised) is/are not based on the EU definition of the risk of poverty or social exclusion,<sup>4</sup> the report focuses on access for **low-income children** to each of these services, using the national low-income criterion (or criteria) that apply (e.g. having a household income below a certain threshold or receiving the minimum income). Throughout this report, “low-income children” is to be understood as children living in low-income households.

In Portugal, all six services covered by the ECG are primarily regulated at national level. Therefore, the report seeks to provide a general picture of the (effective/free) access for low-income children in the country.

---

<sup>1</sup> The full text of the ECG Recommendation is available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv%3AOJ.L.2021.223.01.0014.01.ENG&toc=OJ%3AL%3A2021%3A223%3ATOC>.

<sup>2</sup> According to the Recommendation (Article 3f), “school-based activities” means “learning by means of sport, leisure or cultural activities that take place within or outside of regular school hours or are organised by the school community”.

<sup>3</sup> Once they have been submitted to the European Commission, the plans are made publicly available online at: <https://ec.europa.eu/social/main.jsp?catId=1428&langId=en>.

<sup>4</sup> According to the EU definition, children are AROPE if they live in a household that is at risk of poverty (below 60% of median income; hereafter AROP) and/or severely materially and socially deprived, and/or (quasi-)jobless. For the detailed definition of this indicator and all other EU social indicators agreed to date, see: <https://ec.europa.eu/social/main.jsp?catId=756&langId=en>. In 2021, EU Member States agreed a target to be reached by 2030: a reduction in the number of people AROPE in the EU by at least 15 million, including at least **5 million children**.



The report is structured by service:

- effective and free access to high-quality ECEC;
- effective and free access to education and school-based activities;
- effective and free access to at least one healthy meal each school day;
- effective and free access to healthcare (e.g. free regular health examinations and follow-up treatment, and access to medicines, treatments and support);
- effective access to healthy nutrition;<sup>5</sup> and
- effective access to adequate housing.<sup>6</sup>

## 1. Early childhood education and care (ECEC)

This section describes the situation regarding effective and free access for low-income children to ECEC services.

### 1.1 Mapping accessibility and affordability of ECEC

Childcare and pre-schooling are separate structures in Portugal. Childcare relates to children under age 3 and is usually provided in crèches. Pre-schooling usually relates to children aged 3-6 (up to the compulsory school age). Each will be addressed separately in the following paragraphs.

Beginning in September 2022, childcare provided in the public sector (and publicly funded private sector) became free for all children born on or after September 2021. In January 2023, the measure was widened to the whole private sector, as long as there are no vacancies in the public and publicly funded private sectors in the municipality where the child's parent(s) live or work. Childcare is also free for children born before September 2021 who are recipients of the first and second income bands of child benefit (see Section 1.1.1). There is a legislative proposal that, in September 2023, children born as from September 2022 become entitled to free childcare; and that, in September 2024, children born as from September 2023 become entitled. This would mean that, in September 2024, all children up to age 3 would be entitled to free childcare. During the time childcare is still not free for all children, at least 30% of free places should be allocated to children who are recipients of child benefit (first, second and third income bands) or of the child guarantee benefit (Table 1.1). Once a child is granted free access, they will keep it for their whole period in childcare.

Economic vulnerability is one of the priority criteria for access to public and publicly funded private childcare. Article 9 of Order 198/2022<sup>7</sup> establishes that there should be a social and economic assessment of the household.

Being a recipient of child benefit (first and second income bands) or of the child guarantee benefit are also part of the priority criteria – along with age, having an impairment or disability, and living in a single-parent household. These other priority criteria do not have to be met on top of the low-income criterion.

---

<sup>5</sup> According to the Recommendation (Article 3g), “healthy meal” or “healthy nutrition” means “a balanced meal consumption, which provides children with nutrients necessary for their physical and mental development and for physical activity that complies with their physiological needs”.

<sup>6</sup> According to the Recommendation (Article 3h), “adequate housing” means “a dwelling that meets the current national technical standards, is in a reasonable state of repair, provides a reasonable degree of thermal comfort, and is available and accessible at an affordable cost”.

<sup>7</sup> Available at: <https://dre.pt/dre/detalhe/portaria/198-2022-186721643>.

These priorities are expected to remain in place even when entitlement is extended all children from September 2024. Presumably, if two children are applying (one with priority and the other without priority) but only one place is available, the place will be allocated to the child with priority.

Public pre-schooling is free for all children from age 3. However, only children from age 4 have a legal entitlement to it. Following a government decision, entitlement to children from age 3 was expected to have become effective in 2020. However, it has still not been implemented, which potentially affects the access by these children to public pre-schooling, especially if they do not belong to a priority group (see next sections). Free pre-school activities are limited to 25 hours per week. Families may choose to extend the number of hours of pre-school activities. This extra time has to be paid for.

Priority of access is granted first to children aged 5, then 4 and finally 3, born up to 15 September. Subject to these priorities, recipients of the school social action measure (ASE) have priority access to pre-schooling if they are in a situation otherwise equal to that of a child who is not a recipient. Being a recipient of the ASE is the fourth tie-breaking criterion. The first three criteria regard: (a) children with special needs; (b) children of under-age students; and (c) children sharing the same household with a child already enrolled in the same school (Table 1.1).

**Table 1.1: Accessibility and affordability of ECEC**

Childcare (usually under age 3)		Pre-school setting (usually age 3 to compulsory school age)	
Accessibility	Affordability	Accessibility	Affordability
ENT-ALL those born from Sept. 2021 (current situation)	FREE-POOR0years (current situation)	ENT-ALL4years	FREE-ALL3years
ENT-ALL0years (from Sept. 2024)	FREE-ALL for those born from Sept. 2021 (current situation)	PRIOR4years	
PRIOR those born from Sept. 2021 (current situation)	FREE-ALL0years (from Sept. 2024)		
PRIOR0years (from Sept. 2024)			

*Note: "ENT-ALLxxx" means a legal entitlement for all children from the age of xxx. "PRIORxxx" means priority access for low-income children from the age of xxx. "NO" in the accessibility column means no entitlement or priority for low-income children. "FREE-ALLxxx" means free for all children from the age of xxx. "FREE-POORxxx" means free for low-income children from the age of xxx. If the information differs between centre-based and home-based care, the information provided applies to centre-based care.*

### 1.1.1 Conditions for qualifying as a "low-income child"

As mentioned in Section 1.1, economic vulnerability is one of the priority criteria for access to public and (publicly funded private) childcare. However, no concrete conditions for qualifying as an economically vulnerable household could be found in legislation and regulations. The aforementioned order also refers to the fact that the assessment should be made with the co-operation of parents or those with parenting responsibilities, and that it should include the weighting of criteria regarding household economic status and of other circumstances leading to the social vulnerability of the child and respective household.

As regards priority to pre-schooling, as mentioned in Section 1.1, recipients in the first and second income bands of child benefit (annual gross household income lower than the social support index (IAS) times 14 – €6,726.02 in 2023) are entitled to receive the ASE. For this purpose, household income may not exactly be per capita, as it is divided by the number of children or young people eligible for child benefit, plus one. This means that only one adult is considered per household in capitation, but that all adults are considered when calculating the ASE household income.

### 1.1.2 Relation between the group(s) of children who have free access and the AROPE population of children in the relevant age group(s)

**Comparison of the value of the national low-income criterion/a with the value of the national AROP threshold:** In order to be eligible for the ASE, the annual gross income of (for example) a family with two adults and two children in 2023 should be, at the most, €26,904.08. According to Eurostat, the AROP threshold (60% median) in 2021 was €13,972 per year for a family with two adults and two children under 14. For a family of one adult and two children under 14 the same figures would be €20,178.06 and €10,645, respectively.<sup>8</sup> As from September 2024, all children are expected to have free access to ECEC.

**Total number of children with free access and comparison with the total number of AROPE children in the relevant age group:** According to the latest available *Carta Social* report, in 2020 there were 98,196 children in childcare. In that same year, 64% of the total of 118,280 places available were state-subsidised (i.e. 75,699) (GEP-MTSSS, 2021: 23). Given the changes introduced in childcare, most children currently have free access to the service. As from September 2024, all children are expected to have free access.

In the 2020/2021 schooling year, there were 238,618 children enrolled in pre-school education in mainland Portugal (DGEEC, 2022: 15). Based on data included in the latest “state of education” report (for 2021), issued by the National Education Council in December 2022, 31,184 children enrolled in pre-schooling in the 2020/2021 schooling year were ASE recipients (CNE, 2022: 267).

The number of AROPE children aged 0-3 and 4-5 could not be found on the Eurostat or Statistics Portugal (INE) websites. According to Eurostat, the number of AROPE children under 6 in Portugal in 2021 amounted to approximately 88,000<sup>9</sup> (i.e. 17.1% of all children under 6). The absence of data regarding the current situation, which is rather different from the situation in 2020 for which there are data, prevents a sound comparison of the number of children having free access to childcare with that of AROPE children in the same age band.

**Non-take-up:** According to Eurostat, 49.5% of children under 3 were not in formal childcare in Portugal in 2021. A similar percentage (49.4%) attended formal childcare for at least 30 hours per week and 0.9% attended for fewer than 30 hours per week. According to Eurostat, only 14.5% of children were not in formal pre-school education in 2021, while the vast majority (83.3%) attended it for at least 30 hours per week.<sup>10</sup>

EU-SILC<sup>11</sup> data for 2019 revealed that more AROPE children aged 0-2 (55.8%) than non-ARPE children 0-2 (52.2%) participated in ECEC. Conversely, among children aged 3 to the minimum compulsory school age, significantly more non-ARPE children than AROPE children participated in ECEC (95.6% compared with 79.5%) (EC, 2022b).

Readily available information on possible reasons for non-take-up of childcare does not reflect the current situation, where the service is becoming progressively free for all children, but rather the previous one where the service was largely paid. As an example, a case study developed in one municipality in central Portugal (Arganil) concluded that the reasons for non-take-up included the possibility of resorting to other carers (notably grandparents), financial reasons, and the incompatibility of schedules with jobs (Ferreira, 2018: 65).

<sup>8</sup> Eurostat, EU-SILC [ILC\_LI01\_\_custom\_4566916], downloaded on January Jan 2023.

<sup>9</sup> Eurostat, EU-SILC [ILC\_LI02\_\_custom\_4568109], downloaded on January Jan 2023.

<sup>10</sup> Eurostat, EU-SILC [ILC\_CAINDFORMAL\_\_custom\_4567542], downloaded on 17 January 2023.

<sup>11</sup> European Union statistics on income and living conditions.

### **Groups of children over-represented in the AROPE population but lacking free access:**

No groups of children (significant in size) could be identified who were over-represented in the AROPE population but lacked free access to the service.

## 1.2 Main barriers to effective and free access to ECEC for low-income children

### 1.2.1 Financial barriers

Not applicable.

### 1.2.2 Non-financial barriers

There are a few non-financial barriers faced not only by low-income children but by all children in their actual access to ECEC services.

An opinion recently issued by the Portuguese Economic and Social Council (CES), noted that: *“there are relevant regional disparities regarding the social services for children aged 0 to 3. The metropolitan areas of Porto and Lisbon are still those requiring more infrastructures, and which have a lower coverage regarding the resident population”* (CES, 2022: 52-53)

The process in progress of making childcare free for all children (see Section 1.1) has not been free from upsets. The programme’s regulations establish that places in the public (and private not-for-profit) sectors should be exhausted in the whole territory of a municipality before families are entitled to enrol their children in a private for-profit childcare facility. Media reports have reflected that this has led to situations where there would be a need to travel long distances to find a free place, especially in larger municipalities.<sup>12</sup>

In January 2023, the media also reported the government’s willingness to change the programme, notably by establishing the smaller *“freguesia”* territorial unit as the reference unit rather the municipality, at least in some parts of the country, and by dropping the demand that places in the public and private not-for-profit sectors should be exhausted before families are entitled to enrol their children in a private for-profit childcare facility.<sup>13</sup>

Extending the legal entitlement to pre-school education to children from age 3 has still not been completed.

## 1.3 Free meals provision for low-income children in ECEC

Order 198/2022, of 27 July, establishes that free childcare includes a set of activities and services, including meals. The same eligibility conditions for access to the service (Section 1.1) therefore apply to access to free meals.

The state co-funds all meals served in pre-school canteens throughout the country. After co-funding from the central state, meals have a reference price, to be established on a yearly basis by ministerial order. In the 2022/2023 schooling year, the price to be paid by pupils was established at €1.46. However, there is additional co-funding for pupils who are beneficiaries of the ASE.

---

<sup>12</sup> “Creches: Governo admite gratuitidade em colégios privados quando vaga disponível no setor social é muito distante” Sapo 24 January 2023, available at: <https://24.sapo.pt/actualidade/artigos/governo-admite-creche-gratuita-nos-colegios-privados>.

<sup>13</sup> “Regras da Creche Feliz vão ser alteradas” Negócios 24 January 2023, available at: <https://www.jornaldenegocios.pt/economia/educacao/detalhe/regras-da-creche-feliz-va-ser-alteradas>.

Meals are provided free of charge to children placed in the first income band of child benefit (annual gross household incomes per capita<sup>14</sup> up to half the IAS times 14 – €3,363.01 in 2023). Children placed in the second income band of child benefit (annual gross household incomes per capita higher than half the IAS times 14, and lower than the IAS times 14 – higher than €3,363.01, and lower than €6,726.02, in 2023) should pay 50% (i.e. €0.73).

## 2. Education and school-based activities

This section describes the situation regarding effective and free access for low-income children to education and school-based activities.

Section 2.1 maps the main school costs in public primary and secondary education, distinguishing between the following:<sup>15</sup>

- compulsory basic school materials (schoolbag, pens, glue, scissors, etc.);
- compulsory school materials (textbooks, school supplies, notebooks, etc.);
- compulsory specific clothing (uniform, sports clothing);
- IT equipment requested by the school;
- sports equipment or musical instruments requested by the school;
- compulsory extramural activities (e.g. school trips, sport, culture) that are part of the curriculum;
- other compulsory fees or costs; and
- transport costs to or from school.

Section 2.2 briefly describes the cash benefits specifically intended to help meet educational costs.

Finally, Section 2.3 seeks to identify the main barriers that prevent low-income children from having effective and free access to “school-based activities” as defined in the Council Recommendation establishing the ECG (see “Introduction” section). Given that the distinction between these activities and some of the activities covered above – especially the “compulsory extramural activities (e.g. school trips, sport, culture) that are part of the curriculum” – may not always be clear-cut, the focus of Section 2.3 is specifically on school-based activities which are not part of the curriculum.

### 2.1 Mapping the main school costs in public primary and secondary education

The situation regarding school costs is similar in public primary and secondary education. IT equipment (laptop, mouse, and internet connection) is lent to all children. Student textbooks are also lent to all children. Exercise books that are part of the same package as textbooks are not provided and should be purchased if the student so wishes (this is the reason for selecting “MOST ITEMS” in Tables 2.1a and 2.1b, below). The student must return the books/equipment in proper condition at the end of the schooling year or cycle. If the books/equipment are returned damaged or not returned at all, then a payment will be required.

---

<sup>14</sup> As mentioned above, for this purpose the household income is divided by the number of children or young people eligible for child benefit, plus one. This means that only one adult is considered per household in capitation, but that all adults are considered when calculating the ASE household income.

<sup>15</sup> Tuition fees charged by private schools are not covered.

There are no groups of children who have free access to sport or music equipment or to sports clothing.

Basic school materials and extramural activities are not free. However, ASE recipients are entitled to credits in their school cards, designed to cover these costs (see Section 2.2).

Transport (one round trip per school day) is free for students whose place of residence is located over 3 km away from their school, and for students with mobility difficulties benefiting from measures of inclusive education (regardless of the distance between their place of residence and the school). However, if the student chooses to enrol in a school other than the one determined by their place of residence, they will no longer be entitled to free transport.

**Table 2.1a: School costs of primary education (free for all/low-income children)**

Basic material	Books	Clothing	IT	Sports or music equipment	Extra-mural activities	Other fees or costs	Transport
NO	MOST ITEMS	NO (sports) NA (uniforms)	ALL	NO	NO	NA	ALL

*Note: "ALL" means that this category is free for all children. "MOST ITEMS" means that most but not all items in the category are free for low-income children, "NO" means that most/all items in the category are not free for low-income children. "NA" (not applicable) means that this category is not requested/compulsory in the country.*

**Table 2.1b: School costs of secondary education (free for all/low-income children)**

Basic material	Books	Clothing	IT	Sports or music equipment	Extra-mural activities	Other fees or costs	Transport
NO	MOST ITEMS	NO (sports) NA (uniforms)	ALL	NO	NO	NA	ALL

*Note: "ALL" means that this category is free for all children. "MOST ITEMS" means that most but not all items in the category are free for low-income children. "NO" means that most/all items in the category are not free for low-income children. "NA" (not applicable) means that this category is not requested/compulsory in the country.*

### 2.1.1 Conditions for qualifying as a "low-income child"

Not applicable.

### 2.1.2 Relation between the group(s) of children who have free access and the AROPE population of children in the relevant age group(s)

Not applicable: regarding some items, access is free for all children and regarding others there are no groups of children who have free access (Tables 2.1a and 2.1b).

## 2.2 Cash benefits whose specific purpose is to help meet educational costs

ASE recipients are entitled to credits in their school cards for the acquisition of compulsory basic school materials and for supporting extramural activities.

Recipients in the first and second income bands of child benefit (annual gross household income per capita<sup>16</sup> lower than the IAS times 14 – €6,726.02 in 2023) are entitled to receive ASE. In 2023, the first income band covers households with annual gross incomes per capita up to €3,363.01 (half the IAS times 14). They are eligible to credits per schooling year of €16 for basic materials and €20 for extramural activities. The second income band covers households with annual gross incomes per capita higher than €3,363.01 and lower than €6,726.02 (the IAS times 14), who are eligible to receive credits per schooling year of €8 for basic materials and €10 for extramural activities. There are no other criteria that have to be met on top of the low-income criterion.

No studies could be found analysing whether these benefits adequately cover the above costs for low-income children. However, media reports from late August 2022 indicated an increase of over €15 in the price of a set of basic school materials (for pupils in primary education) compared with September 2021, from €92.12 to €107.36.<sup>17</sup> Additionally, according to Pordata, in 2020 Portuguese families spent, on average, €502.60 on education.<sup>18</sup> Bearing these figures in mind, the amount provided by ASE to help meet the costs of basic materials is clearly insufficient and has become less relevant in the face of rising prices. In any case, existing studies/data are not sufficient to properly address this issue.

There are no cash benefits and/or maximum billing mechanisms whose purpose is specifically to help other groups of children to meet educational costs.

**Comparison of the value of the national low-income criterion/a with the value of the national AROP:** In order for them to be eligible, the annual gross income of (for example) a family with two adults and two children in 2023 should not exceed €26,904.08. According to Eurostat, the AROP threshold (60% median) in 2021 was €13,972 per year for a family with two adults and two children under 14. For a family of one adult and two children under 14 the equivalent figures would be €20,178.06 and €10,645, respectively.<sup>19</sup> This means that the low-income criterion is higher than the value of the AROP in Portugal, and thus all AROP children should receive credits in their school cards.

**Total number of children with free access and comparison with the total number of AROPE children in the relevant age group:** Based on data included in the latest state of education report, issued by the National Education Council in December 2022, 169,042 students enrolled in primary and secondary education in the 2020/2021 schooling year were ASE recipients (first income band of child benefit). Another 145,290 were ASE recipients in the second income band of child benefit (CNE, 2022: 267). According to Eurostat, in 2021 there were 291,000 AROPE children aged 6-17.<sup>20</sup> Any comparison between these figures should take into account the fact that the amounts of the cash benefits provided to help meet costs are deemed not to be sufficient to reach free access (see Sections 2.2 and 2.3.1, below).

<sup>16</sup> As already mentioned, for this purpose the household income is divided by the number of children or young people eligible for child benefit, plus one. This means that only one adult is considered per household in capitation, but that all adults are considered when calculating the ASE household income.

<sup>17</sup> “Material escolar está 16,5% mais caro este ano do que em 2021”, Dinheiro Vivo 29 August 2022, available at: <https://www.dinheirovivo.pt/economia/material-escolar-esta-165-mais-carro-este-ano-do-que-em-2021--15121428.html>.

<sup>18</sup> Available at: <https://www.pordata.pt/portugal/despesas+medias+de+consumo+final+das+familias+total+e+por+tipo+de+bens+e+servicos-768-247971>.

<sup>19</sup> Eurostat, EU-SILC [ILC\_LI01\_\_custom\_4566916], downloaded on 17 January 2023.

<sup>20</sup> Eurostat, EU-SILC [ILC\_PEPS01N\_\_custom\_4568269], downloaded on 17 January 2023.

**Non-take-up:** No readily available data/studies could be found providing information on non-take-up among children entitled to free access to the service.

**Groups of children over-represented in the AROPE population but lacking free access:** We could find no readily available data/studies on groups of children (significant in size) that are over-represented in the AROPE population but lack free access to the service.

## 2.3 Main barriers to effective and free access to school-based activities for low-income children

### 2.3.1 Financial barriers

School-based activities are organised in schools and made available to all students for free. Some of these activities are not expected to entail costs for students, as the schools supply materials (e.g. chess and manga/anime clubs). Conversely, for school sports (for instance) students are required to supply their own sports clothing. However, no studies could be found analysing whether the out-of-pocket costs for accessing school-based activities are a financial barrier for low-income children.

### 2.3.2 Non-financial barriers

We could find no studies addressing the main non-financial barriers faced by low-income children in their actual access to school-based activities.

## 3. Free meals at school

This section describes the situation regarding effective and free access for low-income children to at least one free healthy meal each school day.

### 3.1 Mapping free provision of school meals

The state co-funds all meals served in school canteens throughout the country. After co-funding from the central state, meals have a reference price, to be established on a yearly basis by ministerial order. In the 2022/2023 schooling year, the price to be paid by pupils for each meal was established at €1.46. However, there is additional co-funding for pupils who are ASE beneficiaries.

#### 3.1.1 Conditions for qualifying as a “low-income child”

A free school meal is provided free of charge only to children placed in the first income band of child benefit (annual gross household incomes per capita<sup>21</sup> up to half the IAS times 14 – €3,363.01 in 2023). Children placed in the second income band of child benefit (annual gross household incomes per capita higher than half the IAS times 14, and lower than the IAS times 14 – higher than €3,363.01, and lower than €6,726.02, in 2023) should pay 50% (i.e. €0.73).

---

<sup>21</sup> As already mentioned, for this purpose the household income is the sum of the incomes of all its members divided by the number of children or young people eligible for child benefit, plus one.



### 3.1.2 Relation between the group(s) of children who have free access and the AROPE population of children in the relevant age group(s)

**Comparison of the value of the national low-income criterion/a with the value of the national AROP:** In order for them to be eligible, the annual gross income of (for example) a family with two adults and two children in 2023 should be, at the most, €13,452.04. According to Eurostat, the AROP threshold (60% median) in 2021 was €13,972 per year for a family with two adults and two children under 14. For a family of one adult and two children under 14 the equivalent figures would be €10,089.03 and €10,645, respectively.<sup>22</sup> Most children below the AROP threshold should therefore, in theory, have access to free school meals.

**Total number of children with free access and comparison with the total number of AROPE children in the relevant age group:** Based on data included in the latest state of education report, issued by the National Education Council in December 2022, 169,042 students enrolled in primary and secondary education in the 2020/2021 schooling year were ASE recipients (first income band of child benefit), thus having free access to school meals (CNE, 2022: 267). According to Eurostat, in 2021 there were 291,000 AROPE children aged 6-17,<sup>23</sup> of which 258,000 were AROP<sup>24</sup> (whether combined or not with household severe material and social deprivation and/or (quasi-)joblessness). About 58% of AROPE children thus had free access to school meals (66% of AROP children).

**Non-take-up:** No readily available data/studies could be found providing information on non-take-up among all children entitled to free access to the service.

**Groups of children over-represented in the AROPE population but lacking free access:** We could find no readily available data/studies on groups of children (significant in size) who are over-represented in the AROPE population but lacking free access to the service.

## 3.2 Main barriers to effective and free access to school meals for low-income children

### 3.2.1 Financial barriers

No relevant studies/data could be found analysing whether the out-of-pocket cost of school meals is a financial barrier.

As mentioned in Sections 3.1.1 and 3.1.2, a free school meal is provided free of charge only to children placed in the first income band of child benefit. This means that many AROPE children placed in the second income band of child benefit should pay 50% (i.e. €0.73 per meal), which may represent a financial barrier for low-income households.

Media reports emphasise concrete difficulties faced by households in paying for school meals, even if they provide no information on whether these concern low-income children or not. One such report notes that, in January 2022, households owed approximately €30,000 in co-payments they should have made to the municipality of Braga (in the north of Portugal) for school meals that their children had consumed.<sup>25</sup> Another news report said that, in

<sup>22</sup> Eurostat, EU-SILC [ILC\_LI01\_\_custom\_4566916], downloaded on 17 January 2023.

<sup>23</sup> Eurostat, EU-SILC [ILC\_PEPS01N\_\_custom\_4568269], downloaded on 17 January 2023.

<sup>24</sup> Eurostat, EU-SILC [ILC\_LI02\_\_custom\_4568109], downloaded on 17 January 2023.

<sup>25</sup> “Famílias devem à Bragahabit mais de 30 mil euros em refeições escolares”, *Correio do Minho* 25/01/2022, available at: <https://correiodominho.pt/noticias/familias-devem-a-bragahabit-mais-de-30-mil-euros-em-refeicoes-escolares/135581>.

September 2022, households owed approximately €49,000 in co-payments to the municipality of Azambuja (in central Portugal) regarding school meals for 270 pupils in ECEC and primary education.<sup>26</sup>

### 3.2.2 Non-financial barriers

The evidence available highlights barriers experienced not by low-income children particularly but rather by all children in their actual access to at least on free healthy meal each school day.

Media reports from late 2021 noted that, according to data provided by the Ministry of Education, about 3,000 complaints had been received regarding school meals in the previous five-year period (i.e. roughly 2017-2021). As a result, 57 fines were applied to private service-providers. Out of those, the majority (43) related to failure to comply with staffing levels.<sup>27</sup>

Over time, one of the problems commonly identified by schools and parents, and echoed in the media, concerned the fact that the sole criterion for selection of a service-provider was price, deemed to result in a lower quality of service. As from 2018, municipalities assumed the responsibility for education, including the selection of service-providers for school meals, which may lead to geographical disparities in their provision. Media reports at the local level stress that, at least in some municipalities, price remains the major criterion and thus problems regarding quality also remain. However, no recent studies on this subject could be found.

A report issued within the scope of the control plan on the quality and quantity of school meals highlighted that, between September 2017 and May 2018, meals provided were classified as “good” on average (i.e. 4 on a scale of 1 to 6 – from “very bad” to “excellent”) in all the areas considered: meal preparation, quality of the products, service presentation, staff presentation, efficiency and hygiene. As for potential non-take-up, the report noted that 3.6% of all meals ordered were not served because pupils did not attend the meal. However, it did not provide any possible explanations for this (DGESTE, 2018).

A study developed within the scope of the “eat Mediterranean: a programme for eliminating dietary inequality in schools” project, financially supported by the European Economic Area grants programme, assessed the nutritional composition of meals in 25 schools of two municipalities in central Portugal (Santarém and Alpiarça) during the 2015/2016 and 2016/2017 schooling years. The study pointed out the need to reduce protein and salt content and to increase the content of carbohydrates, as well as to adjust the portions served to suit the age of the pupils (Santos *et al.*, 2018).

## 4. Healthcare

This section describes the situation regarding effective and free access for low-income children to healthcare, focusing on vaccinations, care from a general practitioner (GP) or infant nurses, specialist care, dental care (not orthodontics) and prescribed medicines.

---

<sup>26</sup> “Encarregados de educação devem 49 mil euros de refeições escolares à Câmara de Azambuja”, O Mirante 11/09/2022, available at: <https://omirante.pt/sociedade/2022-09-11-encarregados-de-educacao-devem-49-mil-euros-de-refeicoes-escolares-a-camara-de-azambuja>.

<sup>27</sup> “Ministério da Educação recebeu três mil queixas sobre cantinas escolares desde 2017”, Expresso 21/11/2021, available at: <https://expresso.pt/sociedade/2021-11-08-Ministerio-da-Educacao-recebeu-tres-mil-queixas-sobre-cantinas-escolares-desde-2017-ef7baa49>.

## 4.1 Mapping the provision of free healthcare services and products

Children in Portugal are exempt from most healthcare costs. There is an exception as regards vaccination: the national vaccination plan includes most vaccines, but does not include (for example) those against the intrusive meningococcal disease, the rotavirus and influenza. This applies to all children and not only to low-income children.

The provision of healthcare services by GPs, infant nurses and specialists is free for all children (Table 4.1).

Under the national programme for the promotion of oral health, “dentist-cheques” are issued to specific groups of the population, including children. The cheques are delivered in schools and cover five different paediatric age groups: (a) under 6; (b) 7-9; (c) 10-12; (d) 13-15; and (e) 16-18. Oral hygiene consultations take place at the ages of 7, 10 and 13. Dental care monitoring takes place in health centres but also in private settings, as the cheques may be used to pay private providers adhering to the scheme. The use of dentist-cheques is not compulsory. However, if a child does not use a cheque they will no longer be entitled to subsequent cheques.

Prescribed medicines are not free.

**Table 4.1: Healthcare costs (free for all/low-income children)**

Vaccination	GP	Infant nurses	Specialist care	Dental care (not orthodontics)	Prescribed medicines
MOST S&P	ALL	ALL	ALL	ALL	NO

*Note: “ALL” means that all services/products in the category are free for all children. “MOST S&P” means that most but not all services/products in the category are free for low-income children. “NO” means that most/all services/products are not free for low-income children.*

### 4.1.1 Conditions for qualifying as a “low-income child”

Not applicable: overall access is free for all children. Restrictions regarding vaccination concern all children and not only low-income children (see Section 4.1).

### 4.1.2 Relation between the group(s) of children who have free access and the AROPE population of children in the relevant age group(s)

Not applicable: overall access is free for all children. Restrictions regarding vaccination concern all children and not only low-income children (see Section 4.1).

## 4.2 Cash benefits whose specific purpose is to help meet healthcare costs

There are no cash benefits whose specific purpose is to help meet healthcare costs. As mentioned in Section 4.1, most healthcare costs are waived for all children. However, the latest Eurostat data including an indicator on children’s unmet needs for medical examination or treatment and for children’s dental care show that, in 2017, a higher rate of AROP children (under 16) had such unmet needs – 3.7% and 18%, respectively – than the corresponding rates for non-AROP children under 16, of 0.3% and 6.5%.<sup>28</sup>

<sup>28</sup> Eurostat, EU-SILC [ILC\_HCH14], downloaded on 17 January 2023.

The latest spring report released by the Portuguese Observatory of Health Systems (OPSS) called the attention to the “*challenge of access [highlighting that] Portuguese families pay, in average, €600 per year in out-of-pocket health expenses. Over 26% of the poorest quintile in Portugal declare having unmet needs for financial reasons. (...) If the Portuguese spend so much despite the fact that the national health system is universal and free, that is because the universal and free national health system still does not provide the necessary answer*” (OPSS, 2022: 8).

In fact, as acknowledged by the EC in its latest country profile regarding Portugal: “*the public share of health expenditure is comparatively low (61%) in Portugal. This translates into one of the highest proportions of out-of-pocket payments for health care in the EU, which in Portugal is almost twice the EU-27 average*” (EC, 2022a: 54).

### 4.3 Non-financial barriers to effective and free access to healthcare

No studies/data could be found that specifically addressed non-financial barriers to effective and free access to healthcare by low-income children or even all children. There are, however, studies/data addressing such barriers regarding the Portuguese population as a whole. According to the latest data made available on the portal of the National Health Service (*Serviço Nacional de Saúde – SNS*), in May 2022 about 1.57 million patients (i.e. 14.8% of SNS users) had not been assigned an SNS GP. This was double the percentage registered in the end of 2018, when the number of patients without an assigned SNS GP reached the lowest level ever recorded (7%).

Geographical imbalances also persist. The latest report released by the OPSS considered that: “*the existing challenges in terms of access are aggravated by the regional asymmetries of health services*” (OPSS, 2022: 89). Healthcare resources are unequally distributed across different regions and, within regions, across municipalities. Outside the three major urban areas, hospitals do not cover all medical specialisms. According to the latest study on the time distance to health facilities, over 90% of the population in mainland Portugal were deemed to live within a radius of 15 minutes travel by road to the nearest health unit (ERS, 2015). However, the need to travel and to pay for transport is deemed to bring additional challenges for low-income households.

Another area of concern regards waiting times. In 2021, 21%, and 28.9% of users still waited for longer than the maximum guaranteed response times for a specialist medical appointment and for surgery,<sup>29</sup> respectively (ACSS, 2022).

The European Commission’s Staff Working Document Country Report on Portugal for 2022 highlighted that: “*the COVID-19 pandemic has highlighted the structural challenges underlying Portugal’s health system [including] shortages of health staff and shortcomings in workforce planning across geographies and medical specialties. In particular, and despite the number of health professionals being on the rise for the past decade, the nursing workforce per 1,000 inhabitants was still below the EU average in 2019*” (EC, 2022a: 54).

<sup>29</sup> The maximum guaranteed response times for a specialist medical appointment and for a surgery are 120 days and 180 days, respectively. Lower response times, of 3-60 days, apply in cases of neoplasia.

## 5. Healthy nutrition

This section describes the situation regarding effective access for low-income children to healthy nutrition.

### 5.1 Main barriers to effective access to healthy nutrition

#### 5.1.1 Financial barriers

The major barrier hindering access for low-income children to healthy meals in Portugal is low salaries. Despite the phased increases in the statutory minimum wage in recent years, low salaries still largely characterise wide segments of the labour market.<sup>30</sup> Media reports from mid-January 2023 suggested that, according to a report of the Office for Strategy and Planning of the Ministry for Labour, Solidarity and Social Security (GEP-MTSSS) presented to the Standing Committee for Social Dialogue, about 30% of employed workers in Portugal received the statutory minimum wage in 2022, and 56% received a monthly salary lower than €1,000.<sup>31</sup> According to the latest statistical bulletin issued by the GEP-MTSSS, the mean monthly gross salary in Portugal in September 2022 was €1,145.<sup>32</sup>

The process of phased increases in the minimum wage has rekindled the ongoing debate about the protection it grants against poverty. According to the latest INE data,<sup>33</sup> the poverty threshold (60% median) in 2021 was €6,608 per year or €551 per month. Even considering its current amount in 2023, the minimum wage would therefore only lift a worker over the poverty line if they were a single person or a single parent with one child. It would not be sufficient to lift (for example) a two-adult household with one child out of poverty.

Based as they are on wages, the mean amounts of social transfers also tend to be low. As acknowledged by the European Commission: *“Portugal still faces coverage and adequacy challenges in social protection. (...) The coverage of social benefits is weak. (...). The persistently low level of poverty and inequality reduction by social transfers points to lower expenditure on social protection than the EU average and to inefficiencies in the structure and design of the social protection system”* (EC, 2022a: 4).

Furthermore, it highlighted that: *“the impact of social transfers in reducing poverty is below the EU average. There is a multitude of social benefits directed at vulnerable groups, often serving similar objectives and resulting in relatively low take-up rates. This leads to the fragmentation of the social protection system, a lack of effective focus on those most in need, and undue complexity”* (EC, 2022a: 12).

Another example regards the adequacy of the minimum income scheme (RSI). According to the latest statistics from the Institute of Social Security (*Instituto de Segurança Social, Instituto Público – ISS-IP*),<sup>34</sup> in December 2022 the monthly mean values of the RSI were €121.59 per person and €259.39 per household. These amounts have been fairly stable over

<sup>30</sup> The statutory monthly minimum wage for 2023 is €760. The current government proposed a new phased increase up to €900 at the end of its mandate in 2026.

<sup>31</sup> “Mais de metade dos trabalhadores recebia menos de 1000 euros em 2022”, Expresso 19/01/2023, available at: <https://expresso.pt/economia/trabalho/2023-01-19-Mais-de-metade-dos-trabalhadores-recebia-menos-de-1000-euros-em-2022-bcbb282d>. In latest years, the GEP/MTSSS has been releasing these reports on an annual basis. Even if its results are mentioned in the media, the 2022 report itself is still not available.

<sup>32</sup> Available at: <http://www.gep.mtsss.gov.pt/documents/10182/10925/bedez2022.pdf/54fe9882-f363-40a8-b187-854c76c508ac>.

<sup>33</sup> Available at: [https://www.ine.pt/xportal/xmain?xpgid=ine\\_tema&xpid=INE&tema\\_cod=1110&xlang=pt](https://www.ine.pt/xportal/xmain?xpgid=ine_tema&xpid=INE&tema_cod=1110&xlang=pt).

<sup>34</sup> Available at: <https://www.seg-social.pt/estatisticas>.

the years. As acknowledged by the European Commission: *“the adequacy of the minimum income is low at 37.5% of the poverty threshold (EU: 58.9%)”* (EC, 2022a: 4). In addition, the OECD, in its latest economic survey of Portugal (released in December 2021) emphasised that the amounts provided by the RSI were low and that it covered only around 20% of poor households, below the OECD average of 40%. It stressed that: *“the reference income threshold needs to increase to improve protection against poverty risks”* (OECD, 2021: 46).

Access for low-income children to healthy meals has probably become more difficult following recent price inflation, including the very significant increases registered for food products. According to the INE, the price of food and non-alcoholic beverages increased by 20% in 2022 compared with 2021, which represented the highest increase in about four decades.<sup>35</sup> According to the INE, EU-SILC data showed that, in 2022, 3% of households in Portugal said they were unable to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day, compared with 2.4% in 2021.

The national programme for the promotion of healthy nutrition for 2022-2030 highlighted that: *“available data suggest that the socio-economically vulnerable population is disproportionately more affected by obesity, diabetes and hypertension. (...) This may be partially explained by the barriers of access to an adequate nutrition (...); in 2015-16, about 19.3% of Portuguese households had financial difficulties in obtaining food”* (DGS, 2022: 11-12).

### 5.1.2 Non-financial barriers

Available information is scarce regarding non-financial barriers that hinder access for low-income children to healthy meals. In any case, the latest available annual implementation report of the Operational Programme for Support to the Most Deprived, co-funded by the Fund for European Aid to the Most Deprived (FEAD) in Portugal (see Section 5.2), stressed that the programme’s accompanying measures, namely those under the “selection of foodstuffs” theme *“have the declared objective of building the capacity of recipients of food support regarding the principles of a healthy and nutritionally adequate diet”* (POAPMC, 2022: 46).

A PhD thesis on social inequalities in access to healthy nutrition emphasised that: *“the results from the study in the sample of households with children revealed that food insecurity among households is associated with different energy balance related behaviours, in particular, regarding the consumption of fruit and vegetables, fruit juices and soft drinks intakes”* (Gregório, 2014: 5). It further considered that: *“the price of food and the low literacy in terms of nourishment and health, as determinants of food consumption, have been pointed out as the factors capable of explaining the differences in food consumption according to socio-economic status”* (Gregório, 2014: 13).

The GEP-MTSSS assessed the implementation of the FEAD in Portugal based on a dedicated survey. The report highlighted that the products that respondents most often said they would like to have less of in the food package were frozen spinach, frozen broccoli and a frozen mix of vegetables. These were also the products that more people claimed never to consume. Conversely, 35-55% of the respondents wanted to receive more olive oil, chicken, milk, fish and rice (GEP-MTSSS, 2020: 59-60).

---

<sup>35</sup> Available at:

[https://www.ine.pt/ngt\\_server/attachfileu.jsp?look\\_parentBoui=593306191&att\\_display=n&att\\_download=y](https://www.ine.pt/ngt_server/attachfileu.jsp?look_parentBoui=593306191&att_display=n&att_download=y).

## 5.2 Publicly funded measures supporting access to healthy nutrition

The Operational Programme for Support to the Most Deprived, co-funded by the FEAD, is aimed at providing people with food products ensuring 50% of their nutritional needs and “contributing to a healthy diet of the most vulnerable population” (POAPMC, 2022: 5). The shopping basket was defined according to the nutritional needs of four groups: (a) adults around age 40; (b) adults over 60; (c) children aged 2-9; and (d) children around age 14. Additionally, the programme provides accompanying measures aimed at raising the awareness of end-recipients regarding (for example) the prevention of food waste. Food products are pre-identified in vouchers that recipients may use in supermarkets. According to the latest available annual implementation report, 46,142 out of the total of 170,371 recipients of the measure in 2021 (27%) were children up to the age of 15<sup>36</sup> (POAPMC, 2022: 31).

According to a mid-term evaluation of the FEAD in Portugal, end-recipients were identified according to the concept of economic need as used by the ISS-IP within the scope of the sub-system of social action. Economic need is defined as the risk of social exclusion, for circumstantial or structural reasons, experienced by a person/household with a monthly per capita income lower than the amount of the social pension (€224.24 per month in 2023), updated annually by reference to the IAS (Perista and Perista, 2018). No evidence of other priority criteria that have to be met on top of the low-income criterion could be found in available documents and information.

Partner organisations at the local level (beneficiaries of the programme) have primary responsibility for identifying people in a situation of economic need. The idea is that identification derives from the knowledge that partner organisations have from local contexts. The intention is also that local knowledge should allow partner organisations to change final recipients from one month to another (e.g. if a recipient is hospitalised for a month, another person may take their place). Partner organisations gather the social security number of the people identified (usually of a household representative), which is included in the FEAD information system. The interoperability between the FEAD and the social security systems makes it possible to confirm whether the household identified is indeed in a situation of economic need according to the social security system’s criteria (Perista and Perista, 2018).

## 6. Adequate housing

This section describes the situation regarding effective access for low-income children to adequate housing.

### 6.1 Publicly funded measures supporting access to adequate housing – Housing allowances

Until very recently, there were no national housing benefits/allowances that specifically helped low-income households with children to cover their housing costs. However, in late March 2023 the Portuguese government approved the “extraordinary support to rents” (*Apoio extraordinário à renda*). This is a temporary measure, valid for a five-year period and aimed at supporting access to adequate housing, even if not specifically for low-income households

---

<sup>36</sup> No figures regarding children up to age 17 could be found.

with children. In order to be entitled to it, households should have gross annual incomes up to €38,632, an effort rate with the housing rent of at least 35%, and a rental contract established before 16 March 2023 for a permanent home (secondary homes are excluded). In such circumstances, they will be entitled to a housing allowance of up to €200 per month. The allowance is assigned automatically.

In late March 2023 the government also approved an allowance for monthly mortgage interest rate payments. This is also a temporary measure, valid till 31 December 2023. As a general rule, in order to be entitled households should have gross annual incomes up to €38,632 and should not have financial assets such as bank deposits, savings certificates, shares or units in investment funds, higher than 62 times the IAS (i.e. €29,786.66 in 2023).

Additionally, contracts should relate to loans up to €250,000 at a variable interest rate, the effort rate with the housing mortgage should be at least 35%, and the contract should have been established before 16 March 2023 for a permanent home. There should be no mortgage payments in arrears.

The allowance corresponds to a percentage (75% or 50%, depending on the income bracket) of the difference between the current value of the indexer and the value of the indexer at the start of the loan plus three percentage points. In the case of an effort rate of 50% or more, the bonus covers the difference between the present value of the indexer and the threshold of three percentage points. The request should be made by the beneficiary from the financial institution.

These measures are very recent. No studies or data could be found analysing whether these allowances adequately cover the housing costs for low-income households with children. In any case, the maximum support limit per year is 1.5 times the IAS (i.e. €720.65 in 2023), which means a maximum support of around €60 per month. This may provide some relief for low-income households with children.

In Portugal, support is also provided through automatically assigned social tariffs for electricity and natural gas, which grant discounts to reduce the electricity and gas bills of households that meet certain socio-economic criteria.

In the case of the social electricity tariff, households should have an annual income equal to or lower than €6,272.64 (plus 50% for each member without income, up to a maximum of 10), or the contract-holder should be a beneficiary of at least one of the following:

- solidarity supplement for older people;
- social integration income (RSI);
- unemployment benefits;
- child benefit;
- social invalidity pension (of the special regime or of the complement of the social benefit for inclusion); and
- social old-age pension.

In the case of the social gas tariff, the contract holder must benefit from at least one of the following:

- solidarity supplement for older people;
- social integration income;
- unemployment benefits;
- child benefit (first income band); and
- social invalidity pension (of the special regime or of the complement of the social benefit for inclusion).



Both social tariffs apply exclusively to contracts for domestic use in a dwelling used as a permanent home. The contracted power should not exceed 6.9kVA in the case of electricity, and 500 cubic metres in case of gas. The discount on the social electricity tariff is 33.8% (without fees and taxes). The discount on the social gas tariff is 31.2% (without fees and taxes). In both cases, there are also exemptions or partial exemptions from some taxes.

## 6.2 Publicly funded measures supporting access to adequate housing – Social housing

### 6.2.1 Mapping the provision of social housing

The criteria for priority access to social housing are established by each municipality. Households with children are sometimes granted priority (e.g. municipality of Cartaxo). In other cases, single-parent households and households with three or more children score the maximum number of points in one out of 15 criteria, and the number of children in the household may be a tiebreaker (e.g. municipality of Penafiel). The municipality of Lisbon grants priority to single-parent households with children, but not to other households with children. The number of children in the household may be used as a tiebreaker. It is the fourth criterion to consider (after, for example, the fact that the household includes a victim of domestic violence, and the number of household members aged 65 or over).

The Portuguese state's investment in housing has traditionally been weak, and has been overshadowed by the commitment to create and consolidate the three major pillars of the welfare state: education, health and social security.

Reflecting on social housing policies in Portugal since 1974, Antunes considered that: *“the housing strategy substantiated in interest subsidies of housing credit. This condensed financial effort and granted a minor role to the remaining options such as indirect promotion or the direct promotion of social housing”* (Antunes, 2019: 14).

Currently, public housing accounts for only 2% of the total housing stock. The “new generation of housing policies” strategy, launched in 2018, established as a medium-term target an increase in the share of publicly supported housing within the overall housing stock from 2% to 5%, which represents an increase of 170,000 housing units.

The national housing programme for 2022-2026 was approved in principle by the Portuguese parliament on 20 January 2023, after which it was referred to the parliament's specialist committee. The programme considers that: *“within the scope of social policies in Portugal, housing was persistently neglected. Given the absence of clear and substantive public answers (...), housing shortage in Portugal for low-income households have lingered for decades and worsened in moments of crisis”* (PCM, 2023: 34). This follows what had been stressed by the Portuguese Recovery and Resilience Plan (RRP), notably: *“the absence of a social housing stock of adequate size and of a structure response to urgent housing needs”* (República Portuguesa, 2021: 89) and the fact that *“previous programmes of public promotion of social housing were oriented, almost exclusively, to the elimination of only one type of housing problem – living in shanties”* (República Portuguesa, 2021: 90).

The European Commission's 2022 country report on Portugal noted that: *“promoting accessible and affordable housing are essential for Portugal to contribute to reaching the 2030 EU headline target on poverty reduction”* (CE, 2022: 50). However, it also emphasised that: *“the social housing stock, while being developed, is still lagging behind demand”* (EC, 2022a: 4).

## 6.2.2 Main barriers to effective access to social housing

### 6.2.2.1 Financial barriers

No concrete financial barriers could be identified hindering access for low-income children to social housing. The regulations on access to social housing mention that any person or household in a vulnerable financial condition, living in indecent housing conditions and without the means to resolve their housing situation, may apply for social housing. Indecent housing conditions include precariousness (for financial reasons or due to domestic violence), overcrowding, insalubrity or insecurity, and inadequacy of the dwelling in relation to the specific characteristics of the resident(s) (e.g. accessibility conditions). However, no concrete definition of vulnerable financial conditions could be found in relevant legislation and regulations.

### 6.2.2.2 Non-financial barriers

Reflecting on the housing field in Portugal, Perista *et al.* emphasised that: “*social housing policies in Portugal have not adequately responded to the housing needs of many low-income households. Access to social housing has been blocked by a market which had to absorb a large number of very low-income households living in shanties for whom the impetus given to owner-occupied dwellings was never an affordable alternative, neither the restricted rental market*” (Perista *et al.*, 2022: 43).

A paper analysing housing policies in Portugal stated that: “*social housing policies were essentially casuistic and circumstantial, without a medium-term or long-term strategy for the promotion of social housing supported by the State*” (Antunes, 2019: 7), adding that: “*existing social housing was built in the specific context of rehousing programmes*” (Antunes, 2019: 14). The Portuguese RRP also acknowledges (see Section 6.2.1) that public programmes for promoting social housing have so far been oriented almost exclusively to the elimination of shanties.

For Pinto, there was a “*weak investment in social housing based on a model targeting the poorest, most spatially concentrated, and most socially homogeneous households. (...) The populations living in social housing neighbourhoods are mostly made up of families with indicators of poverty so high that no social or housing mobility is possible*” (Pinto, 2017: 134-135).

This has resulted in a permanent shortage of social housing. Moreover, as mentioned in the national assessment of rehousing needs: “*the distribution between vacant social housing units and families facing housing precariousness is very uneven. There are units available in municipalities without families in need and there are families in need in municipalities without or with minimal availability of units [further adding that] only 25 municipalities have a number of social housing units available enough to provide an answer to the number of families in need from their municipality, in a total of 200 families*” (IHRU, 2018: 3-4).

## 6.3 Publicly funded measures supporting access to adequate housing – Other measures

In Portugal, there are measures other than housing allowances and social housing which support access to adequate housing. However, these are not specific to low-income households with children.

The programme for supported renting is aimed at promoting the widening of the rental market offer at affordable prices (i.e. at least 20% lower than market prices). It is targeted at households that do not meet the criteria for accessing means-tested public housing support,

but who are also not able to ensure adequate housing without becoming overburdened. The programme establishes maximum rent amounts, minimum and maximum effort rates for tenants of 15% and 35% respectively, and a minimum lease period of five years in cases of permanent residence (nine months in cases of temporary residence).

In 2023, eligibility is limited to households with an annual gross income lower than €35,000 in the case of single-person households or €45,000 in the case of two-person households. For larger households the cap is increased by €5,000 per person.

The programme for supporting the provision of urgent accommodation (*Porta de Entrada*) is aimed at providing urgent accommodation to those who become (or at imminent risk of becoming) deprived of housing, either temporarily or definitively, as a result of an unpredictable or exceptional event. Applicants should not be in position to access any adequate housing alternative, and the value of their movable assets should be lower than 240 times the IAS (i.e. €115,303.20 in 2023).

The programme for supporting access to housing (*1º direito*) is aimed at providing a housing solution for those living in poor housing conditions and unable to meet the costs of adequate housing.<sup>37</sup> The concept of poor housing conditions encompasses situations of: (a) precariousness – including homelessness; (b) unsafety and insalubrity; (c) overcrowding; and (d) the incompatibility of housing with specific characteristics of the resident, such as disability or incapacity.

In order to be entitled to support, the applicant should not be the owner or tenant of another dwelling considered to be suitable, their movable assets should be lower than 60 times the IAS (€28,825.8 in 2023), and their household's mean monthly gross income should be lower than four times the IAS (i.e. €1,921.72 in 2023).

The “cost-controlled housing” measure is aimed at using public funds to support the entry into the market of dwellings that may be sold or rented at lower prices.

In February 2023 the Portuguese government announced a new set of measures aimed at supporting access to adequate housing, even if not specifically for low-income households with children. Some measures were already contained in legislation (see Section 6.1). Some others have not been included: for instance, the possibility for the state to rent available dwellings from proprietors and then sub-rent them at lower prices.

---

<sup>37</sup> This programme is now being financed by the RRP, which envisages an investment of €1,211 million. It is aimed at addressing the needs of 26,000 households living in undignified conditions, by 2026. However, according to media reports of April 2023, this represents fewer than half of the 67,000 households identified by municipalities as living in undignified conditions: “Habitação: quase 80% dos municípios identificaram 67 mil famílias a viverem em condições indignas”, Expresso, 5 April 2023, available at: [https://expresso.pt/economia/economia\\_imobiliario/2023-04-05-Habitacao-quase-80-dos-municipios-identificaram-67-mil-familias-a-viverem-em-condicoes-indignas-3f5b4660](https://expresso.pt/economia/economia_imobiliario/2023-04-05-Habitacao-quase-80-dos-municipios-identificaram-67-mil-familias-a-viverem-em-condicoes-indignas-3f5b4660).

## References

- ACSS – Administração Central do Sistema de Saúde (2022), *Relatório Anual sobre o Acesso a Cuidados de Saúde nos Estabelecimentos do SNS e Entidades Convencionadas em 2021*, Lisboa, ACSS. Available at: <https://www.acss.min-saude.pt/wp-content/uploads/2022/09/Relat%C3%B3rio-de-Acesso-2021.pdf>.
- Antunes, G. (2019), “Política de habitação social em Portugal: de 1974 à actualidade”, *Forum Sociológico*, 34-1, 7-17. Available at: <http://journals.openedition.org/sociologico/4662>; DOI: <https://doi.org/10.4000/sociologico.4662>.
- CES – Conselho Económico e Social (2022), *A Natalidade em Portugal: uma questão política, económica e social*, Lisboa, CES. Available at: [https://ces.pt/wp-content/uploads/2022/01/ces\\_parecer\\_natalidadeportugal.pdf](https://ces.pt/wp-content/uploads/2022/01/ces_parecer_natalidadeportugal.pdf).
- CNE – Conselho Nacional de Educação (2022), *Estado da Educação 2021*, Lisboa, CNE. Available at: [https://www.cnedu.pt/content/EE2021/EE2021-Web\\_site.pdf](https://www.cnedu.pt/content/EE2021/EE2021-Web_site.pdf).
- DGEEC/DSEE/DEEBS/DEES (2022), *Perfil do Aluno 2020/2021*, Lisboa, Direção-Geral de Estatísticas da Educação e Ciência (DGEEC). Available at: [https://www.dgeec.mec.pt/np4/97/%7B\\$clientServletPath%7D/?newsId=147&fileName=DGEEC\\_DSEE\\_2022\\_PERFIL\\_DO\\_ALUNO\\_2021.pdf](https://www.dgeec.mec.pt/np4/97/%7B$clientServletPath%7D/?newsId=147&fileName=DGEEC_DSEE_2022_PERFIL_DO_ALUNO_2021.pdf).
- DGESTE – Direção-Geral dos Estabelecimentos Escolares (2018), *Plano Integrado de Controlo da Qualidade e Quantidade das Refeições Escolares – Relatório*, Lisboa, DGESTE. Available at: [https://www.dgeste.mec.pt/wp-content/uploads/2018/07/Relatorio\\_servico\\_refeicoes\\_escolares.pdf](https://www.dgeste.mec.pt/wp-content/uploads/2018/07/Relatorio_servico_refeicoes_escolares.pdf).
- DGS – Direção-Geral da Saúde (2022), *Programa Nacional para a Promoção da Alimentação Saudável 2022-2030*, Lisboa, Direção-Geral da Saúde.
- EC – European Commission (2022a), *Commission staff working document 2022 Country Report – Portugal Accompanying the document Recommendation for a Council Recommendation on the 2022 National Reform Programme of Portugal and delivering a Council opinion on the 2022 Stability Programme of Portugal {COM(2022) 623 final} – {SWD(2022) 640 final}*. Available at: [https://commission.europa.eu/system/files/2022-05/2022-european-semester-country-report-portugal\\_en.pdf](https://commission.europa.eu/system/files/2022-05/2022-european-semester-country-report-portugal_en.pdf).
- EC – European Commission (2022b), *Employment and Social Developments in Europe 2022, Young Europeans: employment and social challenges ahead*, Luxembourg, Publications Office of the European Union.
- ERS – Entidade Reguladora da Saúde (2015), *Estudo sobre o desempenho das unidades locais de saúde*, Entidade Reguladora da Saúde. Available at: [https://www.ers.pt/uploads/writer\\_file/document/1298/Estudo\\_sobre\\_o\\_Desempenho\\_das\\_ULS\\_-\\_final.pdf](https://www.ers.pt/uploads/writer_file/document/1298/Estudo_sobre_o_Desempenho_das_ULS_-_final.pdf).
- Ferreira, M. (2018), *A creche e o desenvolvimento da criança: perceções dos pais e dos profissionais*, Dissertação de Mestrado apresentada ao Instituto Superior de Serviço Social do Porto. Available at: <https://comum.rcaap.pt/bitstream/10400.26/28246/1/Monica%20Catarina%20Duarte%20Ferreira.pdf>.
- GEP-MTSSS – Gabinete de Estratégia e Planeamento do Ministério do Trabalho, Solidariedade e Segurança Social (2020), *PO APMC Cabazes Alimentares* –

- Resultados dos questionários efetuados aos beneficiários em 2018*, Lisboa, GEP-MTSSS. Available at: [https://poapmc.portugal2020.pt/documents/27821/91122/Question%C3%A1rio\\_Cabazes\\_Alimentares+POAPMC.pdf/62962303-9143-42f3-83c1-bac350fab596](https://poapmc.portugal2020.pt/documents/27821/91122/Question%C3%A1rio_Cabazes_Alimentares+POAPMC.pdf/62962303-9143-42f3-83c1-bac350fab596).
- GEP-MTSSS – Gabinete de Estratégia e Planeamento do Ministério do Trabalho, Solidariedade e Segurança Social (2021), *Carta social – rede de serviços e equipamentos – Relatório 2020*, Lisboa, GEP-MTSSS. Available at: <https://www.cartasocial.pt/documents/10182/13834/csocial2020.pdf/54b90a92-0a88-4d78-b99a-c53b7061fd0e>.
- Gregório, M.J. (2014), *Desigualdades sociais no acesso a uma alimentação saudável: um estudo na população portuguesa*, Dissertação de candidatura ao grau de doutor em Ciências do consumo alimentar e nutrição, apresentada à Faculdade de ciências da nutrição e alimentação da universidade do Porto.
- IHRU – Instituto da Habitação e da Reabilitação Urbana (2018), *Levantamento Nacional das Necessidades de Realojamento Habitacional*, Lisboa, IHRU. Available at: [https://www.portaldahabitacao.pt/documents/20126/58203/Relatorio\\_Final\\_Necessidades\\_Realojamento.pdf/d67e9ed8-93aa-d65a-eb36-b586389b2295?t=1550355947650](https://www.portaldahabitacao.pt/documents/20126/58203/Relatorio_Final_Necessidades_Realojamento.pdf/d67e9ed8-93aa-d65a-eb36-b586389b2295?t=1550355947650).
- OECD – Organization for Economic Cooperation and Development (2021), *OECD Economic Surveys: Portugal 2021*, OECD. Available at: <https://www.oecd.org/economy/surveys/Portugal-2021-OECD-economic-survey-overview.pdf>.
- OPSS – Observatório Português dos Sistemas de Saúde (2022), *E Agora? Relatório de Primavera 2022*, Lisboa, OPSS. Available at: <https://www.opssaude.pt/wp-content/uploads/2022/06/RELATORIOPRIMAVERA-2022.pdf>.
- PCM – Presidência do Conselho de Ministros (2023), *Proposta de Lei n.º 46/XV/1.ª*. Available at: <https://app.parlamento.pt/webutils/docs/doc.pdf?path=6148523063484d364c793968636d356c6443397a6158526c63793959566b786c5a79394562324e31625756756447397a5357357059326c6864476c32595338354e5755344d545a695a5330345a6d497a4c5451354f4449744f4451304f4330314d6d466a4e7a51305a574e6a4d6d45755a47396a65413d3d&fich=95e816be-8fb3-4982-8448-52ac744ecc2a.docx&Inline=true>.
- Perista, P., Cardoso, A., Perista, H. (2022), *ESPN Country Profile – Portugal 2021-2022*, ESPN, Brussels, European Commission.
- Perista, P., Perista, H. (2018), *FEAD Country Fiche for Portugal*, Metis.
- Pinto, T.C. (2017), ‘Moving to a new housing pattern? New trends in housing supply and demand in times of changing. The Portuguese case’, *Critical Housing Analysis*, Volume 4 Issue 1, pp 131-141. Available at: <http://www.housing-critical.com/viewfile.asp?file=2465>.
- POAPMC (2022), *Relatório anual de execução do FEAD – PO I*. Available at: [https://poapmc.portugal2020.pt/documents/27821/30774/Implementation+report\\_2014PT05FMOP001\\_2021\\_0\\_pt.pdf/59d2c036-cc9a-4075-83cd-4bbb8d03d382](https://poapmc.portugal2020.pt/documents/27821/30774/Implementation+report_2014PT05FMOP001_2021_0_pt.pdf/59d2c036-cc9a-4075-83cd-4bbb8d03d382).
- República Portuguesa (2021), *PRR – Recuperar Portugal, Construindo o Futuro*. Available at: <https://www.portugal.gov.pt/download-ficheiros/ficheiro.aspx?v=%3d%3dBQAAAB%2bLCAAAAAAABAAzNDQzMgYAqIWY YAUAAAA%3d>.

Santos, M., Mendes, S., Dinis, A., Rascôa, C., Rito, A.I. (2018), “Avaliação da intervenção qualitativa na composição nutricional de refeições escolares: programa Eat Mediterranean”, *Observações – Boletim Epidemiológico n.º 23*, Instituto Nacional de Saúde Doutor Ricardo Jorge. Available at: [http://repositorio.insa.pt/bitstream/10400.18/5674/3/Boletim\\_Epidemiologico\\_Observacoes\\_N23\\_2018\\_artigo7.pdf](http://repositorio.insa.pt/bitstream/10400.18/5674/3/Boletim_Epidemiologico_Observacoes_N23_2018_artigo7.pdf).

## **Getting in touch with the EU**

### **In person**

All over the European Union there are hundreds of Europe Direct Information Centres. You can find the address of the centre nearest you at: <http://europa.eu/contact>

### **On the phone or by e-mail**

Europe Direct is a service that answers your questions about the European Union. You can contact this service

- by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),
- at the following standard number: +32 22999696 or
- by electronic mail via: <http://europa.eu/contact>

## **Finding information about the EU**

### **Online**

Information about the European Union in all the official languages of the EU is available on the Europa website at: <http://europa.eu>

### **EU Publications**

You can download or order free and priced EU publications from EU Bookshop at: <http://bookshop.europa.eu>. Multiple copies of free publications may be obtained by contacting Europe Direct or your local information centre (see <http://europa.eu/contact>)

### **EU law and related documents**

For access to legal information from the EU, including all EU law since 1951 in all the official language versions, go to EUR-Lex at: <http://eur-lex.europa.eu>

### **Open data from the EU**

The EU Open Data Portal (<http://data.europa.eu/euodp/en/data>) provides access to datasets from the EU. Data can be downloaded and reused for free, both for commercial and non-commercial purposes.

