

National Action Plan on Social Inclusion issued for 2003-5

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In October 2003, the Portuguese government set out the main objectives of the National Action Plan on Social Inclusion for 2003-5, based on the EU strategy to combat poverty and social exclusion. The Plan includes measures such as increased coverage of crèches and day nurseries and the promotion of 'active ageing'. Trade unions have made criticisms of some aspects of the Plan and of their level of involvement.

On 14 October 2003, the Ministry of Social Security and Labour (Ministro da Segurança Social e do Trabalho) set out the main objectives of the National Action Plan on Social Inclusion (Plano Nacional de Acção para a Inclusão, PNAI).

Combating social exclusion is identified as one of the social policy goals of the EU in Articles 136 and 137 of the Treaty establishing the European Community. At the Lisbon European Council summit, held in March 2000 ([EU0004241F](#)), it was agreed that an impact on the eradication of poverty should be made by 2010 and that the 'open method of coordination'- comprising common objectives, national action plans and a joint Commission/Council report (a process which also forms the basis of the European employment strategy) - should be used for this purpose ([EU0111101N](#)). As part of this strategy, all Member States submitted their first National Action Plans (NAPs) against poverty and social inclusion during 2001 in response to common objectives on poverty and social exclusion agreed by the Nice European Council in December 2000 ([EU0012288F](#)). In these plans, each Member State presented its priorities and efforts for 2001-3 in promoting social inclusion and combating poverty and social exclusion. Member States were to submit their second inclusion NAPs, covering 2003-5, by July 2003 in response to revised [common objectives](#).

Within the scope of the key goals adopted in Nice, and based on an analysis of the situation and of the main Portuguese trends, the 2003-5 PNAI sets out a global strategy for social inclusion, identifying the main strategic intervention areas, the political measures that are under way and those that are to be implemented. The Plan seeks to allow for interaction with other national and European processes under way for the coordination of policies, by ensuring linkage, complementarity and coherence, in particular with the Portuguese NAP for employment, the strategy on the future of the pensions system, the Integrated Programme for Innovation (Plano Integrado para a Inovação, PROINOV) and the Implementation Plan for the National Strategy on Sustainable Development (Plano de Implementação da Estratégia Nacional de Desenvolvimento Sustentável 2003-5, PIENDS). In order to make the proposed objectives more effective, it is seen as necessary to stress the importance of linkage with existing institutional support, in respect to both the NAP on employment and the PNAI. The programme is based on a Portuguese methodology for fighting social exclusion, and in favour of inclusion and cohesion.

Social exclusion in Portugal

According to Eurostat data, in 1999, 21% of the Portuguese population was living below the 'at risk of poverty' line. There was also a high level of persistent poverty: 14% of the population lived below the poverty line in 1999 and in at least two of the three preceding years. However, there have been some improvements in Portuguese living standards. The poverty rate shows a downward trend for the period 1995-9, not unrelated to the introduction of a series of new measures and intervention methods, including the PNAI since 2001, which is seen as having had a decisive role in linkage and enhancing the dynamics of inclusion. Without the effect of social security transfers (excluding pensions), the percentage of the population at risk of poverty rises to 27%. Unlike other EU countries, Portugal also depends on the non-monetary component of income in assessing the living standards of its population. In 2000, 13.5% of total family income came from non-monetary income (such as 'self-consumption', 'self-supply', wages in kind and non-monetary transfers). This had the effect, for the same year, of reducing the poverty rate by two percentage points. In 1999, the proportion of national income received by the richest 20% of the population was 6.4 times greater than that received by the poorest 20%. Furthermore, the greater incidence of low incomes among women is leading, in Portugal, as in most countries, to the phenomenon of the 'feminisation of poverty'. The incidence of the risk of poverty for women was 22% in 1999, 3 percentage points higher than that for men.

According to the 1999 data, the 'relative poverty rate' in Portugal was in the region of 21% - this figure reflects the percentage of people who have annual incomes of below EUR 3,187 - while the indices for 'absolute poverty' show a rate of 14%. With respect to the 'guaranteed minimum income' (Rendimento Mínimo Garantido) ([PT0107159F](#)), now called the 'social insertion income' (Rendimento Social de Inserção) - a scheme whereby people below a certain level of income receive a payment from the state in exchange for a commitment to participate in a social integration programme - it is noteworthy that 95% of the families that benefit from this scheme are families in persistent poverty. It is mentioned in the PNAI that 'it is not due to the fact that people work' that they often 'cease to be poor'- hence the phenomenon of the 'working poor' ([TN0208101S](#)) is widespread in Portugal. Portugal has 2 million people living in poverty.

Also according to the 1999 data, 70% of the Portuguese population have less than nine years' schooling, while 45% of young people aged between 18 and 25 are no longer involved in education at any level. Not all the data are so negative, however; for example, it should be pointed out that the Portuguese are living, on average, longer, that 99% of births currently occur in hospital units and that there has been a major decline in the illiteracy rate.

Objectives of the 2003-5 Plan

From among the several measures and objectives set out in the PNAI for 2003-5, the government has highlighted the following:

- an increase in state-run crèche provision in order to cover 20% of children aged up to three years and an increase in the national coverage of day nurseries to 90% of children aged between three and six years;
- promoting a balance between the increase in new employment possibilities and family support activities; and
- promotion of 'active ageing', involving the population aged between 55 and 65, in order for their activity rate to reach around 55%, by proposing an increase in volunteering, part-time work, telecommuting and working from home.

The Plan will be discussed in the parliamentary Labour and Social Affairs Committee, then sent to the cabinet for approval, and should come into force at the end of 2003.

Social partner positions

The social partners have been consulted on the PNAI 2003-5, although the trade union side states that there was no union involvement at the time of the plan's production. The General Confederation of Portuguese Workers (Confederação Geral de Trabalhadores Portugueses, CGTP) also states that monitoring system for the Plan does not involve the unions, which contradicts the common objectives defined at the European level for mobilising a wide group of social actors.

CGTP considers that the PNAI sets out positive measures, although it is not very ambitious in many actions and goals, and is too general. Based on an assessment of the PNAI 2000-3, CGTP considers that the objectives stated in the Plan should be transformed into practical actions aimed at coordination. It says that at the grass-roots level there are shortcomings relating to isolated actions, resulting both from a lack of coherence between the various policies, which sometimes vary in accordance with the relevant Ministry, and from the malfunctioning of public services. There should be an instrument to improve policies and to develop the national situation with regard to the objective of social inclusion.

Commentary

The understanding that poverty and social exclusion take on complex, multifaceted forms has meant that, in order to bring about multidisciplinary action in several areas and at various levels, it has been necessary for the new National Action Plan on Social Inclusion to have recourse to a wide range of policies within the scope of the global strategy. (António Casimiro Ferreira, Universidade de Coimbra)