

European Network Indicators of Social Quality
- ENIQ -

“Social Quality”
The Portuguese National Report

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CESIS

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Preface

This national report and the 13 others that accompany it are published as part of the final report of the European Network on Indicators of Social Quality (ENIQ). The network began in October 2001 and completed its work in January 2005 and was funded under the Fifth Framework Programme of Directorate-General Research. Also published simultaneously are reports by the European Anti-Poverty Network and the International Council of Social Welfare, European Region based on the work of ENIQ. All of these reports and the deliberations of the Network contributed to the final report which contains a comprehensive overview of all of ENIQ's activities both theoretical and practical.

ENIQ has been focussed mainly on the operationalisation of the four conditional factors of social quality: socio-economic security, social cohesion, social inclusion and social empowerment. This huge collective effort has produced a very original and theoretically grounded instrument for comparative research aimed at understanding the nature and experience of social quality in different countries and in assessing the impact of policy changes. These national reports also reveal the highly differentiated character of the European Union (EU) which cannot be captured by reduction to a small number of social models. At the same time there is clearly an intrinsic affinity in the emphasis on equity and solidarity between most of the countries involved. This intrinsic, philosophical affinity is intriguing for future research.

The work presented in the national reports and the Network's final report will contribute substantially to the major book that will be published by the end of this year. There will also be articles based on the national reports in the European Journal of Social Quality.

The preparation of these national reports was an extremely difficult task. Developing a new approach, a new instrument, and analysing important social and economic trends and their consequences entailed considerable efforts for both established scientists and their junior assistants. The whole network had to grapple with the theoretical aspects of social quality as well as the empirical dimensions. Therefore we want to express our deep gratitude, on behalf of the European Foundation for Social Quality, for the work done by all participants in ENIQ. We will endeavour to ensure that this effort is not wasted and that Europe benefits from their expertise. We also want to acknowledge the excellent contributions of the staff of the Foundation - Margo Keizer, Helma Verkleij, Robert Duiveman and Sarah Doornbos - to the successful completion of this project. They made substantial inputs to all stages of the Network. Finally our thanks to the European Commission for funding ENIQ.

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Contents

1	Introduction	1
2	Socio-Economic Security	3
2.1	Introduction	3
2.2	Financial resources.....	3
2.3	Housing and environment.....	9
2.4	Health and care	12
2.5	Work.....	16
2.6	Education	20
2.7	Trends and reflection	23
3	Social Cohesion	27
3.1	Introduction	27
3.2	Trust.....	27
3.3	Other integrative norms and values.....	30
3.4	Social contract	34
3.5	Social networks.....	36
3.6	Identity	38
3.7	Trends and reflection	40
4	Social Inclusion	43
4.1	Introduction	43
4.2	Citizenship rights	43
4.3	Labour market.....	46
4.4	Services	47
4.5	Social Networks	53
4.6	Trends and reflection	54
5	Social Empowerment	59
5.1	Introduction	59
5.2	Knowledge base	59
5.3	Labour market.....	61
5.4	Openness and supportiveness of institutions.....	64
5.5	Public space	64
5.6	Personal relationships	65
5.7	Trends and reflection	66
6	Social Quality Initiatives	67
6.1	Socio-economic security.....	67
6.2	Social cohesion.....	70
6.3	Social inclusion	72
6.4	Empowerment.....	72
7	Conclusion	75
	References	79
	Annex Social Quality indicators	81
	Annex Collective data	87
	Annex Social Quality theory.....	113

List of Tables and Figures

Table 1	Household income distribution in Portugal and the EU15, 1999-2001	3
Table 2	Household income distribution in Portugal, by income level	4
Table 3	Household income distribution in Portugal, by region	5
Table 4	Proportion of population in poverty (60% of median income) before and after transfers	8
Table 5	Households living in overcrowded conditions.....	10
Table 6	Dwellings without basic amenities	11
Table 7	Crimes registered by the police authorities, and victims of crimes judged in ended processes per 10.000 inhabitants, by type of crime	11
Table 8	Victims of crimes judged in ended processes (per 10.000 inhabitants), by sex.....	12
Table 9	Number of physicians entitled to practice per 10.000 inhabitants	13
Table 10	Number of physicians per 10.000 inhabitants, per region	14
Table 11	Proportion of population taking less than 20 minutes to go to the nearest hospital	14
Table 12	Average number of hours spent on unpaid care by the total population, the population who performed and participation rate	15
Table 13	Percentage of the population whose daily activities include voluntary care, 1999.....	16
Table 14	Proportion of employees with a contract of limited duration (males and females) (temporary job contracts).....	17
Table 15	Number of beneficiaries of parental leave and special leave for attending children	18
Table 16	Work accidents with more than three days absence and fatal work accidents (per 100 000 employed persons), 2000	18
Table 17	Number of hours a full-time employee typically works a week in Portugal and the EU15	19
Table 18	Weekly working time, 2001.....	20
Table 19	Proportion of pupils leaving education without finishing compulsory education in Portugal and in the EU15 (early school leavers)	21
Table 20	Proportion of pupils leaving education without finishing compulsory education in the EU25 (early school leavers).....	21
Table 21	Unemployment rate of college graduates of 94/95, 18 months after graduation, and unemployment rate of total population and the population aged 25 to 34 in the fourth quarter of 1996	23
Table 22	Would you say that most people can be trusted or that you cannot be too careful in dealing with people?	27
Table 23a	Trust in institutions.....	28
Table 23b	Trust in political institutions.....	28
Table 24	Completed cases – judgements concerning failure of a Member-State to fulfil its obligations: outcomes (2003)*	29
Table 25	New cases - actions for failure of a Member-State to fulfil its obligations (1999-2003)	29
Table 26	Importance of family, friends, leisure and politics.....	29
Table 27	Respecting parents.....	30
Table 28	Parents' duty to children	30
Table 29	Doing unpaid voluntary work for:	31
Table 30	Average duration and participation rate of civic activities and volunteering of the population aged 15 or more on an average day, by sex	31

Table 31	Blood donation (%), 2002.....	31
Table 32	Typology of people according to their attitudes towards minorities.....	32
Table 33	What the government should do regarding people from less developed countries coming here to work, Portugal and Total EVS countries.....	32
Table 34	Proportion agreeing with:.....	33
Table 35	Proportion disagreeing with the coming of more (...) immigrants to Portugal?.....	33
Table 36	Openness of mind towards immigrants' customs and traditions	33
Table 37	Who would you not like to have as neighbours?	34
Table 38	Tolerance: From 1 (never) to 10 (always), when can (...) be justified	34
Table 39	Population considering unluckiness, laziness, injustice and the modern progress as the most important reason for living in need.....	35
Table 40	Daily number of hours spent on paid work and on domestic and care tasks, by sex (working day)	36
Table 41	Evaluation of the degree of justice inherent to the division of domestics and care for children tasks, by sex	36
Table 42	Proportion of population belonging to... ..	37
Table 43	Frequency of contact with friends and colleagues in Portugal and in the totality of countries surveyed by EVS.....	38
Table 44	Sense of pride: proportion of the population proud of being Portuguese / European ...	38
Table 45	Sense of national pride: pride of being... ..	39
Table 46	How do you see yourself in the future?	39
Table 47	Feeling attached to:	40
Table 48	Which of these geographical groups would you say you belong to first of all	40
Table 49	Gender pay gap in Portugal and in the EU15.....	44
Table 50	Proportion of women in national government and parliament, 2001	45
Table 51	Proportion of women in the regional parliaments of Azores and Madeira, 2000.....	45
Table 52	Long-term unemployment rate in Portugal and the EU15, by sex (1999-2003).....	46
Table 53	Percentage of persons in employment working part-time and involuntary part-time work in Portugal and in the EU15, by sex, 2002	47
Table 54	Percentage of employees with a fixed term contract in the EU15 and Portugal, by sex, 2002.....	47
Figure 1	Evolution of new cases at local AMI services.....	48
Table 55	Participation in education in the EU15 and Portugal, by age (16-20) and by sex (16-18), in the schooling year of 2000/2001	49
Table 56	Coverage rates for children and for the elderly	50
Table 47	Kilometres of road (and specifically motorways), in Mainland Portugal, by district (1999-2001)	52
Table 58	Percentage of the population aged 16 and over talking to neighbours, 1999	53
Table 59	Frequency of contact with friends and colleagues in Portugal and in the totality of countries surveyed by EVS.....	53
Table 60	Number of Internet clients, by type of access (1999-2002).....	60
Table 61	Internet penetration rate in Portugal and in the EU15	60
Table 62	Yearly increase on Internet penetration rate in Portugal and the EU15 (base=1999) ..	60
Table 63	Internet penetration rate in Portugal and in the EU15 (base=2001).....	60
Table 64	Number of unionised workers, by confederation, 2003	61

Table 65	Population aged 25-64 who participated in education or training in the 4 weeks previous to the inquiry	62
Table 66	Percentage of labour force availing of publicly provided training, by type of training ...	63
Table 67	Proportion of national budget allocated to cultural, recreational and religious services	65

1 Introduction

Emphasising the “dialectic of self-realisation and the formation of collective identities”, the social quality theory becomes operative through four distinct, though interrelated conditional factors: Socio-Economic Security, Social Cohesion, Social Inclusion, and Social Empowerment.

Needless to say, such formulation intends to create the grounds for a theory highly sensible to societal change. Furthermore, it aims to reflect such change in a constant and iterative process not always easy to measure and apprehend but essential in order to grasp quality in the daily life of citizens, as envisaged by the Lisbon Summit.

After almost fifty years of fascist regime (1926-1974), the last three decades witnessed major changes in the Portuguese society, which framed a radically new panorama in the country. Thus, a full understanding of this historical path is crucial for analysing social quality.

Any disruptive event certainly encompasses effects of different and even contrary signals. Some may even point out that the Revolution of 1974 led to losses in some of the conditional factors of social quality. The totalitarian regime deliberately cultivated an image of an inclusive and cohesive society, which, however, barely or not at all mirrored actual society. On the other hand, socio-economic security and empowerment were clearly, and assumedly, diminished.

However, even if appearances may delude, one must be certain that the ensemble of individual self-realisation in a broader collective context of identity formation is only possible under a free democratic context.

Although thirty years have passed, the Portuguese society, today, is still suffering the effects of the previous half-century, which is reflected in all conditional factors. Education and health systems, social security, the mobilisation of civil society, the access and effective usage of citizenship rights, literacy and the access to information are only examples of domains where structural hindrance characterises the country.

All the same, much has already been done and progresses are evident at all levels, despite the non-linear evolution, of going back and forward, decurrent from democratic political change and the alternation of more liberal or more state-centred conceptions.

Eighteen years have passed since Portugal joined the European “family”. “Majority” has been attained. It is now time for the country to develop the necessary steps to guarantee the mainstreaming of social quality throughout all its cohorts, be it territorial, of age, of gender, or any other.

Sections 2 to 5 of this report, referring to the four conditional factors, are all developed in a similar way. After a short introduction, data analysis on the conditional factor is presented. Although emphasis is on the period 1999 to 2001, the most up-to-date information both in national and European (EU15) terms is also considered. Where possible, and relevant, data is differentiated by gender, age, income groups and territorial region. Although data analysis already includes reflection and trends exploration, these are more explicitly addressed in the next part of the section.

Section 2 deals with Socio-Economic Security, and specifically with the domains composing it: 1) financial resources, 2) housing and environment, 3) health and care, 4) work, and 5) education.

In section 3 Social Cohesion and its domains are dealt with. The domains are: 1) trust, 2) other integrative norms and values, 3) social networks, and 4) identity.

On section 4 the focus is on Social Inclusion and on its domains: 1) citizenship rights, 2) labour market, 3) services, and 4) social networks.

Section 5 deals with Social Empowerment. This conditional factor is composed by: 1) knowledge base, 2) labour market, 3) openness (supportiveness) of systems and institutions, 4) public space, and 5) personal relationships.

Section 6 reports on interesting initiatives impacting on social quality through its conditional factors. Mainly good practices are identified. Nonetheless, negative impacts are also considered.

Finally, section 7 concludes this paper with a summary, as well as with policy and practice recommendations.

2 Socio-Economic Security

2.1 Introduction

Socio-economic security is still a feeble dimension regarding social quality in Portugal. Every considered domain reveals considerable problems. From high poverty rates, affecting many working individuals, to the existence of very poor housing conditions and, even today, of shantytowns. From generally poor schooling levels to evident frailties in the health and care systems. As the analysis of the indicators will show and trends will frame, improvements are visible but much has yet to be done.

In the following paragraphs, the Portuguese situation - and its comparative European stand - regarding socio-economic security and its evolution is dealt with, through its domains and indicators.

2.2 Financial resources

2.2.1 Income sufficiency

1. Part of household income spent on health, clothing, food and housing (in the lower and median household incomes)

Household income distribution is essential in order to understand income sufficiency. The high price of goods (in relation to the low salaries), and the characteristics of the housing market lead to specificity that impacts on individual's financial resources.

Table 1 Household income distribution in Portugal and the EU15, 1999-2001

		Health	Clothing ⁽¹⁾	Food ⁽²⁾	Housing ⁽³⁾	Other
Portugal	1999	4.4	7.5	18.5	10.5	59.1
	2000	4.4	7.3	18.2	10.5	59.6
	2001	4.4	7.1	18.8	10.5	59.2
EU15	1999	--	--	--	--	--
	2000	--	--	--	--	--
	2001	3.2	6.5	12.9	21.0	56.4

1) Includes footwear

2) Includes non-alcoholic beverages

3) Includes expenses with water, electricity, gas and other fuels

Source: Eurostat

Although no data regarding the first two years of the reference period was found, data regarding 2001 highlights some differences between the situations in Portugal and the EU15. Namely, it is striking the disparity between the proportional expenditure in housing, since EU15 figure doubles the Portuguese. This seems to be clearly related to the specific situation of the Portuguese housing rental market. After the 1974 Revolution, housing rents were frozen for several years. This situation still has impacts today as a significant part of the rentals come from that time and the amount of those rents is much below

the market prices. However, the Portuguese housing market is rather dual. Rental market has been decreasing in importance. New rents are as expensive, or even more expensive than mortgages thus leading people to buy accommodation instead of renting. Another striking aspect is the higher expenditure on food, reflection of a market where low salaries and food prices similar to the EU average demand for a significant proportion of household income.

Table 2 Household income distribution in Portugal, by income level

	Health	Clothing ⁽¹⁾	Food ⁽²⁾	Housing ⁽³⁾	Other
< €4500	9.8	5.5	31.6	25.1	28.0
€4500 - €8999,99	8.3	5.6	26.5	23.9	35.7
€9000 - €13499,99	5.5	6.4	22.4	20.7	45.0
€13500 – €17999,99	5.2	6.7	19.7	19.8	48.6
€18000 +	4.2	6.9	14.8	18.3	55.8

1) Includes footwear

2) Includes non-alcoholic beverages

3) Includes expenses with water, electricity, gas and other fuels

Source: INE/Inquérito aos Orçamentos Familiares (Household Budget Survey) 2000

From the analysis of the distribution of household expenses by income levels, the first striking aspect regards the evident relation between income and the amount available for other expenses, ranging from slightly more than one fourth of total income of those in the lowest income group to more than half total income of those in the highest income group. This gap has its direct counterpart in those expenses that cannot be easily reduced, namely health and food.

It is striking to notice that lower income households spend, proportionally, twice as much on health as higher income households. Namely medicines have stipulated prices, not directly connected to income, thus implying a stronger burden to lower income individuals/households. Poverty/deprivation, on the other hand, has obvious implications on the individual's health, often leading to long-term or even chronic illness affecting both income and health expenditure.

Although housing expenditure is also clearly related to income, this is less evident, which is consistent with the Portuguese housing market characteristics. Lower income groups tend to concentrate on the feeblest (and cheapest) housing segments and/or share accommodation, namely with other generations/branches of the same family.

Clothing expenditure, being the one where it is easier to cut down, and although increasing according to income, reveals more similar figures for all income groups.

Table 3 Household income distribution in Portugal, by region

	Health	Clothing ⁽¹⁾	Food ⁽²⁾	Housing ⁽³⁾	Other
Portugal	5.2	6.6	18.7	19.8	49.7
Norte (North)	4.6	7.1	19.2	20.8	48.3
Centro (Center)	5.2	6.3	18.5	22.7	47.3
Lisboa e Vale Tejo (Lisbon and the Tagus Valley)	5.6	6.3	17.9	17.2	53.0
Alentejo	5.3	6.7	19.9	22.6	45.5
Algarve	6.0	7.1	19.0	19.6	48.3
Açores (Azores)	5.8	6.9	23.3	17.2	46.8
Madeira	5.4	6.3	18.0	28.1	41.9

1) Includes footwear

2) Includes non-alcoholic beverages

3) Includes expenses with water, electricity, gas and other fuels

Source: INE/Inquérito aos Orçamentos Familiares (Household Budget Survey) 2000

Analysis by region shows somewhat similar expenditure distributions. It must, however, be noticed the highest household expenditure regarding housing in Madeira (soil is scarce and expensive and a significant part of dwellings is new) and regarding food in the Azores (as close from the United States as from Portugal, with all implications in the cost of products).

2.2.2 Income security

2. How do certain biographical events affect household income in relation to previous income

Individuals may face several positive or hazardous steps throughout their life courses. The way these biographical events affect life depends on resources available to the individual, both initial resources and those accumulated throughout daily life. These capitals may enhance positive events and/or buffer negative consequences.

This is absolutely essential in order to capture social quality in Portugal. In a context of change, where policies regarding unemployment, retirement and ill-health leaves and benefits are being reformulated, this is an essential aspect of income security, namely regarding future developments and chronological extension of the battery of indicators.

ECHP (European Community Household Panel) and, in a near future¹, its successor SILC (Survey on Income and Living Conditions) offer privileged access to this kind of information. Assuring access to this information is not at all easy in Portugal. It is however essential to do so. No national data is available to replace these sources on the same conditions but, moreover, it is a shame not to be able to use European data.

¹ SILC is currently being applied.

The effects of unemployment, retirement, sickness and childbirth on household income may be measured through a proxy like replacement rates. The replacement rates for the considered biographical events vary from 55% to 100% of the reference wage. In case of unemployment, social protection includes different benefit schemes. All insured employees in situation of involuntary unemployment due to the termination of the work relationship are entitled to unemployment benefit, corresponding to 65% of the reference wage. The maximum amount cannot exceed three times the minimum wage and the minimum cannot be lower than that wage. According to age at the date of the claim, the worker is entitled to different periods of benefit, from 12 to 30 months.

A new project-law changes the periods of benefit. If it is approved, according to the age at the date of the claim, and from the age of 30 onwards, also according to the number of months with registered remunerations in the 15 years previous to unemployment, the worker will be entitled to different periods of benefit, from 360 to 900 days

There is also the unemployment social benefit. The coverage of the benefit is the same as for the unemployment benefit. In order to be entitled, the worker must not have completed the qualifying period required for the unemployment benefit; to have exhausted entitlement to the unemployment benefit and have remained unemployed; to have a monthly income per capita not exceeding 70% of the minimum legal wage set for the workers in general.

Thus, in general terms, unemployment replacement rates provide income security. The main risk regards the time-gap between applying to the benefit and receiving it, which is, in average, six months. This gap even causes situations where people have to resort to subsidies from Social Assistance in order to survive during the waiting period. Besides the obvious implications in terms of available income, these circumstances certainly have negative psychological effects on individuals who have to resort to a system with a very different and stigmatised nature while being entitled to "regular" transfers.

Long-term unemployed persons aged over 55 at the time of the claim are entitled to an old-age pension from the age of 60 onwards if they satisfy the qualifying period and the other conditions. The retirement age may also be reduced to 55 years for those unemployed who, at the date of unemployment, are aged 50 or over and have at least 20 years of working period with remuneration's record. Their pensions, however, are subject to the application of a reduction's coefficient of 4.5% per year of anticipation². Generally speaking, retirement age is set at the age of 65 and replacement rate in this case is calculated as follows: 2% x Number of contribution years x Reference earnings if the person has up to 20 contribution years; if the person has more than 20 contribution years, tapering rates vary between 2.3% and 2% and are applied to certain RE brackets, which are indexed to the national minimum wage and vary between 1.1 and 8 times or more this wage.

² The number of years of anticipation is reduced by one for every three years beyond the required thirty years of registered remuneration.

According to the Instituto de Seguros de Portugal (Portuguese Insurance Institute), in 1998, 291.146 people were participating in private pension funds, corresponding to around 6% of all employees.

The amount of the benefit in case of sickness varies in time. It is 55% of the reference wage for a period of illness up to 30 days; 60% for a period of illness of 31 to 90 days; 70% for a period of 91 to 365 days; 75% of the reference wage in case of long-term illness beyond a period of 365 days without interruption

The benefit is payable after three-days waiting period (except tuberculosis and hospitalisation or in case of a disease occurred during the entitlement to the maternity benefit, overpassing this period) up to a maximum period of 1095 days. If the incapacity for work still persists after this period, the worker is entitled to the invalidity pension upon medical certification of the permanent incapacity. It is payable to the self-employed workers after 30-days waiting period (except tuberculosis and hospitalisation), for a maximum period of 365 days.

The main risk regarding the sickness benefit is for those suffering from short-term illness(es), that are the major proportion of all illness situations. As the benefit is only payable after a three-days waiting period, anyone missing two days of work will lose the correspondent remuneration. Likewise, missing a five days week will imply a severe loss of remuneration as the first three days will not be paid and the two others will only have a 55% payment.

Childbirth is the biographical event offering a higher replacement rate. The workingwoman with six continuous or non-continuous months of records is entitled to a maternity leave of 120 consecutive days (90 of which necessarily after childbirth), corresponding to 100% of the reference wage. The father is entitled to a paternity leave of 5 days (continuous or not) during the first month following the child's birth. The father is also entitled to a specific benefit during the first 15 days of the parental leave, as long as it immediately follows the maternity or paternity leave, on the amount of 65% of the reference wage

There is also a non-contributive system, for those having not (or having scarcely) contributed to the social security system³, providing invalidity and old age (65+) pensions to those individuals whose gross monthly income is no higher than 30% or 50% of the minimum wage if it is a lone individual or a couple, respectively. The transfers under this system are extremely low. In 2004, Social Pension, for instance, is €151.84.

After this brief qualitative description of the social protection system regarding each of the relevant biographical events, regarding data on this indicator, and having no access to raw data from the ECHP we decided to quote Bruto da Costa et al, in Millar and Apospori (eds.), *The Dynamics of Social Exclusion in Europe*, Cheltenham Glos, Edward Elgar. This book summarises the results of a project

³ Before 1974, contributions for Social Security were an exception, rather than a rule.

that aimed to analyse the vulnerability of four groups (retired, sick/disabled, loneparents, youngsters) to poverty and deprivation, from a dynamic point of view, using ECHP waves of 1995 and 1996. Thus, the citations refer not only to static results of one individual year, but also to movements into and out of poverty, and movements into one of the four above mentioned groups, i.e. changes on the situation of the individuals and households between 1995 and 1996.

On this publication, and regarding transition to loneparenthood, the authors state that “the probability of entering into poverty during the period 1995-96 was higher for lone parent households than for households in general (9.4 per cent versus 6.3 per cent respectively). The incidence of poverty among lone mothers was higher than among couples and adults in general. In 1995, the highest poverty rate (34 per cent) was found among lone mothers with dependent children.”

Regarding the transition into retirement, “the first striking aspect concerns the fact that adults above the age of 45 years who enter the life course group (the retired) have almost twice the probability of entering into poverty between the two waves than all adults (15 per cent versus 8 per cent). Entering retirement means a risk of moving into poverty.”

On the transition to illness/disability, “the crossing of the health condition of the individual with its situation in terms of poverty and deprivation showed that those who made a transition into ill health/disability in wave three had, in wave two, higher chances of being poor and also deprived, than those who had not made the transition. The probabilities vary between around 1.6 (necessities) and 2.4 (poverty) times higher.”

3. Proportion of total population living in households receiving entitlement transfers that allow them to live above EU poverty level

Even today poverty rates are essential to any analysis of socio-economic security and income security in Portugal. When one in each five individuals is living in poverty, the concept cannot just be replaced by the concept of social exclusion. Moreover, to understand the debilities of social transfer processes is essential in order to shed some light into the Portuguese situation, since Portuguese pre-transfer rates show considerable similitude with other, richer, countries.

Table 4 Proportion of population in poverty (60% of median income) before and after transfers

	Before			After		
	Total	Males	Females	Total	Males	Females
1999	27	27	28	21	19	22
2000	27	26	28	21	19	22
2001	24	25	24	20	20	20

Source: Eurostat

In Portugal, social transfers are responsible only for a slight diminishing of poverty rates. Moreover, the analysis of the period 1999-2001 shows that, in the last year under consideration, the impact of

social transfers became less evident. In 1999 and 2000 social transfers were responsible for a decrease of 22.3% in the proportion of population living below poverty level, allowing 6% of the population to change their situation in terms of poverty. In 2001, the decrease was 16.7% allowing for 4% of the population to live above poverty level. Clearly this seems to reveal improvements on the pre-transfers situation more than on transfers.

The lack of poverty prevention of the transfers system may be explained by the fact that the system has salaries as references. As such, in a context of low salaries, transfers are also obviously low, even if replacement rates are good. Transfers under the non-contributive system are even lower. As referred to before, in 2004, Social Pension, for instance, is €151.84. Moreover, the Social Insertion Income is established with reference to Social Pension.

2.3 Housing and environment

2.3.1 Housing security

4. Qualitative description of national housing security situation: certainty that people have of keeping their homes

Being able to keep one's home is a very important output of socio-economic security. Certainty seems, however, difficult to measure and too much related and/or dependent on other features, framed under a sphere of "excessive" subjectiveness, at least in a context of what is desirable for a battery of indicators. An indicator of this kind is tough useful in the Portuguese context. Housing market changed dramatically in the last 30 years and namely in the last 10 years. Own-housing has increased considerably, favoured by a non-competitive rental market (please see indicator 1) and by favourable interest rates/bank campaigns. As a result, in many cases, credit was granted to "on the edge" situations. Economic recession and the slump on the house selling market (both new and used) led to economic stress and the number of evictions rose significantly. From the Portuguese stand this would be a better, more objective, indicator.

Evictions have particularly stricken major urban centres. Lisbon concentrates 32% of the total eviction processes registered. Women represent more than half of the persons involved (54%) in the total number of people affected by eviction situations.

According to the Bank of Portugal, there was a slowing on the increase of the amount of credit of doubtful return on the contracts for house acquisition, although it is still a two-digit growth. Regarding the first semester of 2003, the same period in 2004 showed a rise of 12.3%, totalising 1,112 million Euros.

Regarding tenancy, the situation is two folded and about to change on the short-medium term. Recent contracts are made for renewable periods of five years. The tenant may cease the contract with notice but the landlord has to respect the whole length of the contract. Older contracts are "lifetime" contracts

that the landlords cannot cancel unilaterally. Thus, older tenants probably have a higher certainty of keeping their homes than recent tenants. However, a new law on renting is being proposed, related to the freezing of the housing rents (see indicator 1). This proposal states that the landlords of tenants with frozen rents aged below 65⁴ with a monthly income lower than 5 minimum salaries (€1,828 in 2004), may increase the value of rents to market prices. This proposal will surely have effects on the certainty of keeping a rented home.

5. Proportion of hidden families (i.e. several families within the same household)

According to the last population census, this proportion amounted to 7.6% (Source: INE, Censo 2001).

This is a good indicator of housing security in Portugal. Many times, obtaining housing security implies other compromises. Overcrowding, house sharing by several generations and/or families and generally poor housing conditions are main characteristics of those in the lowest income groups.

2.3.2 Housing conditions

6. Number of square meters per household member

In 1998, in Mainland Portugal, the average useful floor area, considering the total dwelling stock, was 83 square meters. Considering the average number of people per dwelling for the same year (2.9), the number of square meters per household member is 28.6 square meters (Source: EU Housing Stats 2002).

According to Eurostat, in Portugal, in all reference years (1999-2001), each person in a household had, in average 1.5 rooms, contrasting with the 2 rooms available per person in the context of the EU15. Thus it is not surprising that nearly a quarter of poor households lived, in 2001, in overcrowded conditions.

Whatever indicator (square meters; number of rooms) is chosen, this is a vital area for assessing housing conditions in Portugal, in European comparative terms.

Table 5 Households living in overcrowded conditions

	1999		2000		2001	
	Portugal	EU15	Portugal	EU15	Portugal	EU15
< 60% median	26.1	15.9	21.5	15.9	22.8	15.7
> 140%	11.2	4.7	11.0	3.9	8.7	4.1

Source: Eurostat

⁴ Tenants aged 65 or more and tenants with a monthly income lower than 3 minimum salaries (€1,097 in 2004) are not affected by this proposal. Tenants with a monthly income lower between 3 and 5 minimum salaries will pass through a period of three years with conditioned increases on the rents, after which the rent will follow market prices.

7. Proportion of population living in houses with lack of functioning basic amenities (water, sanitation and energy)

Although, in Portugal, the proportions of deprivation regarding these indicators are relatively low, the situation cannot be considered other than grievous, given their basic nature. As such, this is an essential indicator in order to analyse housing conditions and, at a broader sense, socio-economic security and social quality.

European data on this issue, provided by Eurostat's "Living Conditions in Europe" of 2003 will not be used here since the statement that around 90% of Portuguese households do not have, at least, one basic amenity raises serious doubts, namely when compared to national data.

Table 6 Dwellings without basic amenities

	2000*	2001**
Without running water	2.1	1.8
Without electricity	0.5	0.3
Without WC (inside)	5.8	5.5
With WC (outside)		3.6

Sources: * INE/Inquérito aos Orçamentos Familiares (Household Budget Survey), 2000

** INE/Census 2001

Almost every dwelling has all basic amenities. The most problematic situation concerns the availability of an inside WC. It must also be stressed that, in 2001, 1.9% of all dwellings had no WC whatsoever.

2.3.3 Environmental conditions

Within the need of restricting the number of indicators, the two proposed ones seem to be adequate to reflect environmental conditions in Portugal.

8. People affected by criminal offences per 10.000 inhabitants

Table 7 Crimes registered by the police authorities, and victims of crimes judged in ended processes per 10.000 inhabitants, by type of crime

	1999		2000		2001		2002	
	Registered	Judged	Registered	Judged	Registered	Judged	Registered	Judged
Crimes against people	81	22	83	23	85	23	89	22
Crimes against patrimony	209	8	213	10	216	9	228	9
Crimes against peace and humankind/ Crimes against life in society	38	0.3	34	0.3	36	0.3	37	0.3
Crimes against the State	3	0.004	3	0.003	4	...	4	...
Crimes predicted in single penal legislation	32	6	29	4	32	2	34	1
Total	363	37	363	38	372	35	392	32

Source: Ministry of Justice

From the analysis of the period between 1999 and 2002 it is evident an increase (around 8%) in the total number of crimes registered by the police authorities. On the contrary, the number of victims of crimes judged in ended processes (see table below) has decreased in the reference period. Although the two figures are not directly connectable, if a proportion is established it would turn out that only 8% of registered crimes end up being judged.

Table 8 Victims of crimes judged in ended processes (per 10.000 inhabitants), by sex

	1999		2000		2001		2002	
	M	F	M	F	M	F	M	F
Crimes against people	13	9	13	10	13	10	12	10
Crimes against patrimony	6	2	7	3	6	3	6	3
Crimes against peace and humankind/ Crimes against life in society	0.075	0.266	0.038	0.289	0.043	0.268	0.048	0.249
Crimes against the State	0.003
Crimes predicted in single penal legislation	5	0.978	4	0.728	2	0.484	1	0.298
Total	25	12	21	12	21	14	19	13

Source: Ministry of Justice

9. Proportion living in households that are situated in neighbourhoods with above average pollution rate (water, air and noise)

No data was found regarding this indicator.

2.4 Health and care

2.4.1 Security of health provisions

10. Proportion of people covered by compulsory/voluntary health insurance (including qualitative exploration of what is and what is not covered by the insurance system)

This is not a very good indicator to reflect on the security of health provisions and social quality in Portugal. In theory, every Portuguese citizen and non-citizens living legally in Portugal are entitled to the national health insurance system. On the other hand, recent legislation granted the children of illegal immigrants the entitlement to primary health care. However, several problems exist. According to an estimation of the Ministry of Health, dated from 2002, about 1 million people (around 10% of the population) did not had a family physician, situation particularly striking in the districts of Braga, Porto, Lisbon, Setúbal and Aveiro.

According to the Minister of Health, the waiting list for chirurgical procedures in January was around 100.000 patients (1% of the total population). The list is added every month with 6.600 new patients. From the 123.166 patients on waiting list on the 30th June 2002 (date of establishment of the PECLC (Special Programme for the Combat of Chirurgical Waiting Lists), 91.154 have already had their surgery in January 2003. The Government promised to provide everybody on that list a surgery till 2004.

A table with the clinical acceptable waiting period for a surgery, by kind of surgery, was released March 2004. On this date, according to the Minister, the existence of the waiting list ceased. Still according to the Minister, the average waiting period is 3.7 months. However, all these figures are not corroborated by the Observatório Português dos Sistemas de Saúde (Portuguese Observatory on Health Systems) which point to a considerably lower effectiveness of the PECLEC, leading to criticisms from opposition parties and professionals of the Health system.

Private health insurance has been gaining strength. However, a typical situation is that where people do not have private insurance and although entitled to the national health system, never use it due to its debilities and waiting periods. Using private medicine, fully paying it is regular procedure to a proportion of the population, at least for those being able to do so.

Ideally, a good indicator would be the type of health services (public, private, health insurance) used and the reasons for doing so.

2.4.2 Health services

The proposed indicators are pertinent for the characterization of health services. Other indicators could however be proposed, namely regarding the proportion of population with access to medical specialized wards on a X kms range. Recently, the closing of maternity wings in several hospitals has been severely criticised by local populations.

11. Number of practising physicians per 10.000 inhabitants

Table 9 Number of physicians entitled to practice per 10.000 inhabitants

	1999*	2000*	2001**
EU15	37.5	-	--
Portugal	31.8	32.5	32

Sources: *Yearbook 2003, Eurostat, p.102

** INE, Anuário Estatístico, 2002

The number of physicians in Portugal remained quite stable in the reference period, showing some deficit regarding the EU15. This deficit has been recurrently stated over the years and gave origin to a debate on the creation of more medical courses. This debate is enhanced by the fact that, every year, a number of Portuguese students apply and start their studies in Spanish medical schools, namely in the border region. After a period of appliance, where several public and private universities stated their interest in having a medical course, it was decided to create two new medical courses, offering 100 more vacancies in the next schooling year of 2004/2005.

Table 10 Number of physicians per 10.000 inhabitants, per region

North	28.7
Centre	31.1
Lisbon and the Tagus Valley	41.5
Alentejo	16.7
Algarve	24.1
Azores	16.8
Madeira	19.6

Source: INE, Portugal Social 1990-2001

The distribution of physicians by region shows considerable variation. In the North and Centre regions, figures are on “average”, though hiding the considerable diversity inside these regions (as well as on all others), that encompass coastal and inner areas, the former concentrating a higher number of physicians, both in absolute and relative terms. Algarve’s figures are someway in the middle and Lisbon and the Tagus Valley concentrates about twice as much physicians per 10.000 inhabitants as the regions of Alentejo, Azores and Madeira.

12. Average distance to hospital, measured in minutes

Table 11 Proportion of population taking less than 20 minutes to go to the nearest hospital

	Total	Lowest quartile	Highest quartile
Portugal	37,8	27,2	49
EU15	52,8	44,9	60,4

Source: European Foundation for the improvement of working and living conditions: Health and care in an enlarged Europe, based on Eurobarometer 52.1, Q17/D29

While more than half of the EU15 population was able to reach the hospital in less than 20 minutes, only 37.8% of the Portuguese population was able to do the same, situation affecting more severely those with the lowest incomes. In the highest income quartile group, the situation in Portugal was still less favourable than in the EU15 (half these individuals would take 20 or more minutes) but the gap regarding the EU15 was far narrower.

13. Average response time of medical ambulance

According to the Instituto Nacional de Emergência Médica (National Institute for Medical Emergencies), this average response time is 10 minutes in 2004.

Although the source for the data is the institute responsible for medical emergencies, this is a figure that causes some perplexity. It seems too optimistic.

2.4.3 Care services

14. Average number of hours spent on care differentiated by paid and unpaid

From the Portuguese stand, where family, kin and, for instance, neighbourhood, still play an important role in what care is concerned, an indicator on unpaid care seems useful, although it could also be placed under social cohesion. Paid care, on the other hand, does not seem to be assessed in a proper way through the number of hours spent by individuals in such tasks. In consonance with what is proposed regarding health services, it would seem preferable to evaluate the availability of care services.

Table 12 Average number of hours spent on unpaid care by the total population, the population who performed and participation rate

	Total population			Population who performed			Participation rate		
	Total	Male	Female	Total	Male	Female	Total	Male	Female
Care for children*	0h13m	0h05m	0h19m	1h20m	1h00m	1h27m	16.4	9.5	22.6
Physical care and surveillance of children	0h08m	0h02m	0h14m	1h04m	0h46m	1h08m	13.1	5.0	20.4
Care for adults**	0h03m	0h01m	0h04m	0h56m	0h46m	0h59m	5.4	2.8	7.8

* Non specified

** For reasons of age, illness or disability

Source: INE/Inquérito à Ocupação do Tempo (Time Use Survey), 1999

Care is, markedly, a women's activity. Not only participation rates are much higher among women than men but also the time devoted is higher in all the considered categories. Even younger generations reproduce, and even in a reinforced way, gender differences. In average, the time devoted by males aged 15 to 24 to care for children is almost inexistent. On the other hand, females of the same cohort dedicate, in average, 1 hour and 42 minutes on physical care and surveillance of children and almost 2 hours on unspecified care for children.

Care for an adult for reasons of age, illness or disability, during the day, is mostly assured by kin. In 16% of the cases this type of care is assured by a male relative and in 60% of the cases by a female relative. On the other hand, women represent 86% of those stating that care for adults is a permanent task in their lives.

The female character of care is also evident in the context of the EU. Striking on the comparison between Portugal and the EU is the huge gap regarding the proportion of male carers.

Table 13 Percentage of the population whose daily activities include voluntary care, 1999

(looking after children without pay, and include looking after people other than children (providing care to sick, disabled or frail adults) without pay

	Men		Women	
	EU	Portugal	EU	Portugal
Looking after children	19	8	31	28
Looking after people other than children	5	1	8	7

Source: « Living conditions in Europe », Eurostat, 2003, p.112

2.5 Work

2.5.1 Employment security

15. Length of notice before employer can change terms and conditions of labour relation/contract and

16. Length of notice before termination of labour contract

In 1989/1991 there was a relaxation of the employment protection legislation. Firing restrictions were eased through a wider range of admissible lay-off motivations and the abolition of prior authorisation of collective dismissals. Previously, the only grounds for dismissal were disciplinary but the law became less restrictive starting to allow a dismissal for lack of performance (failure of the worker to adapt to the job) and economic redundancy (job extinction). This seems to be reflected on the Portuguese averages of the indicators of the strictness of employment protection legislation (EPL).

In fact, from the late 80's to the late 90's there was a significant decrease on all Portuguese averages. Nevertheless, it must be stressed that in spite of the decrease on the strictness of employment protection, the relative position of Portugal within the OECD has moved towards the axis of countries with the strictest legislation, indicating that the Portuguese legislation lessening was lower than the one occurred in other OECD countries.

The new Código de Trabalho (Labour Code, Law 99/2003 of 27 August) that entered recently into force (1st December 2003) introduced some changes regarding labour contracts. The main current features are as follows. Dismissals without a just cause are forbidden. The contract of employment may terminate due to one of the following reasons: a) Termination by agreement by initiative of any of the parties during the probationary period; b) Expiry; c) Agreement between the parties; d) Dismissal promoted by the employer; e) Resignation, with or without just cause, by initiative of the worker.

Dismissal promoted by the employer may happen due to disciplinary reasons, job extinction (comprised or not by collective dismissal) and failure to adapt. Except if it is due to disciplinary reasons, the dismissed workers are entitled to a compensation corresponding to a month of basis remuneration for each year (or fraction) of service, in a minimum of three months.

The employer has to communicate to each worker the decision of dismissal, in written, at least 60 days previous to the predicted end of the contract. During the period of notice the worker is entitled to time-off rights equivalent to two working days per week, without any loss of retribution.

Employers may end fixed-term contracts if the worker has a 15 days notice, in written, of the desire of the employer. At the end of a fixed-term contract that is not renewed, the worker is entitled to an amount corresponding to three or two days of the basic wage for each complete month of labour if the contract lasted up to or more than six months, respectively. The compensation cannot be inferior to one month of the gross wage.

Employers may end contracts with an uncertain term if the worker has a 7, 30 or 60 days notice, in written, of the desire of the employer, depending on whether the contract lasted for less than 6 months, between 6 and 24 months, or for more than 24 months, respectively.

17. Proportion of employed workforce with temporary, non-permanent, job contract

Table 14 Proportion of employees with a contract of limited duration (males and females) (temporary job contracts)

	1999			2000			2001			2002			2003*		
	MF	M	F	MF	M	F	MF	M	F	MF	M	F	MF	M	F
EU 15	13,2	12.4	14.2	13,4	12.5	14.5	13,4		14.5	13,1	12.1	14.3	--	--	--
Portugal	18,6	17.1	20.4	20,4	18.4	22.7	20,3		22.1	21,8	20.5	23.4	21.1	19.4	23.0

Source: Eurostat, Statistics in focus: Labour force survey principal results 1999,2000,2001,2002, EU and EFTA countries

* INE, Estatísticas do Emprego (Employment Statistics)

Contrary to the situation in the EU15, where the situation is stable – and less widespread - contracts of limited duration have been consistently increasing in Portugal over the last years. This kind of precariousness affected, in 2002, more than one fourth of the employed population, namely women.

18. Proportion of workforce that is illegal

According to a report of McKinsey Consulting (in a national newspaper, Diário de Notícias, 22/06/2004), nearly 30% of Portuguese workers dedicated to activities other than agriculture operate on underground economy.

2.5.2 Working conditions

These indicators are very important in order to assess working conditions. However, in the Portuguese context, other possible indicators seem as important as, for instance, the proportion working on Saturdays, Sundays, and on shift work.

19. Number of employees that reduced work time because of interruption (parental leave, medical assistance of relative, palliative leave) as a proportion of the employees who are entitled to these kinds of working time reductions

In 2002 there were 114.383 births in Portugal (INE, Estatísticas Demográficas). According to the IIES/MSST (Institute for Informatics and Statistics of Solidarity / Ministry of Social Security and Labour) there were 73.762 maternity leaves and 30.404 paternity leaves, thus representing 64.5% and only 26.6% of births.

Table 15 Number of beneficiaries of parental leave and special leave for attending children

	Parental leave		Leave for attending children	
	Males	Females	Males	Females
1999	--	--	854	24.741
2000	146	0	1.186	29.954
2001	4.734	0	1.290	30.502
2002	16.282	0	1.701	36.986
2003	27.384	0	1.700	33.190

Source: IIES/MSST (Institute for Informatics and Statistics of Solidarity / Ministry of Social Security and Labour)

According to the European Community Household Panel (INE/Eurostat), in 2001, among those females working less than 30 hours per week, 28.6% had this option due to domestic work and/or care (31% in 2000 and 24.5% in 1999).

No information was found regarding other kinds of interruption.

20. Number of accidents (fatal / non-fatal) at work per 100.000 employed persons

Table 16 Work accidents with more than three days absence and fatal work accidents (per 100 000 employed persons), 2000

	Work accidents		Fatal work accidents	
	EU	P	EU	P
Total	4016	4863	5	9
Age group under 25	5653	4870	3	5
Age group 45 and over	3446	4998	7	16

Source: « Living conditions in Europe », Eurostat, 2003, p.104

Both the number of work accidents and fatal work accidents are higher in Portugal than in the EU15. Only regarding the number of work accidents of those aged under 25 Portuguese performs better. Regarding fatal accidents, even in this group Portugal has a higher incidence almost doubling EU15 figures. Fatal accidents among older workers (45 and over) more than double EU average. In 2002, according to DEEP/MSST (Department of Studies, Statistics and Planning / Ministry of Social Security and Labour), the incidence rate per 1.000 workers was 58.4 in the case of work accidents and 3.4% in the case of "in itinere" accidents. In that same year, 51.700 work accidents and 53 fatal work accidents were declared in Portugal.

21. Number of hours a full-time employee typically works a week (actual working week)

Section III of the new Labour Code deals with issues related with working time duration and organization. Article 163 defines a maximum limit of a normal working time period that cannot exceed neither eight hours per day nor forty hours per week.

However the articles that follow establish the principle of adaptability (Article 164) and the adaptability special regime (Article 165). Under Article 164 it is said that by collective agreement “the daily limit (...) can increase a maximum of four hours without exceeding sixty hours weekly working duration” and the normal period of work can not exceed an average of fifty hours in a two month period. According to Article 165, by agreement between the employer and the worker, the normal daily working period can be increased until a maximum of two hours, although the weekly working duration cannot exceed fifty hours.

Article 169 states that the average weekly working time can not exceed forty eight hours, including over-time work, within a reference period that can not go beyond twelve months (if fixed in a collective agreement) or a four months reference period that can go until six months in special cases such as in research and development.

The daily resting period is established under the article 176 guaranteeing a minimum resting period of 11 hours between two daily periods of work. However there are some exceptions related to activities that have to ensure a continuity of its service or production, such as research and development.

In a communication from the European Commission (COM (2003) 843 final) it is stated that “only in four Member States (Greece, Ireland, Portugal and the United Kingdom) does the legislation faithfully reproduce the provisions of the Directive”⁵.

Table 17 Number of hours a full-time employee typically works a week in Portugal and the EU15

	1999	2000	2001	2002	2003
EU 15	41.9	41.7	41.6	41.4	:
Portugal	42.4	42.0	41.9	41.9	41.6

Source: Eurostat

⁵ Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions, *Concerning the re-exam of Directive 93/104/EC concerning certain aspects of the organization of working time*. COM (2003) 843 final. Pp 5.

Analysing data, the number of hours worked weekly by a full-time employee decreased over the reference period, both in Portugal and the EU15. Since Law 21/96, of 23 July, on working times the limit for the working week is established in 40 hours⁶.

Thus the decrease of Portuguese working hours is probably reflecting this change. Nevertheless, a significant part of Portuguese workers has very long working hours. According to INE, nearly a quarter of all workers worked more than the established by law. This is clearly reflected in the fact that, in 2003, the average number of hours worked weekly was still clearly higher than the legal threshold.

Analysing national data from 2001, one can see that 47.4% of the Portuguese employed population work between 40-45 hours per week and 23.7% work 45 hours or more.

Table 18 Weekly working time, 2001

Weekly working hours	Total	%	Women	Feminisation rate
1h – 30h	376 338	8.0%	249 500	66.3%
30h – 40h	964 370	20.7%	544 360	56.4%
40h – 45h	2 206 821	47.4%	935 696	42.4%
45h and more	1 103 418	23.7%	322 303	29.2%
Total	4 650 947	100%	2 051 859	44,1%

Source: INE, Census 2001

It is interesting to notice that the feminisation rate decreases as the weekly working hours increase; from all employed who work 45 hours or more per week, only 29% are women.

2.6 Education

2.6.1 Security of education

22. Proportion of pupils leaving education without finishing compulsory education (early school leavers)

Education is a major structural problem in Portugal. A significant part of students leave education system without finishing the nine years of compulsory education (thus till the age of 15) and general schooling attainment is rather low. On this context, this is a good indicator to measure social quality through education.

⁶ Working time regulations define lower working hours in public sector: 35 hours per week (Decree-Law 259/98, of 18 August). This same legal diploma introduces some other innovation such as the creation of the working regime that is only subject to the attainment of certain objectives, which facilitates teleworking. It also widens the application of part-time work. According to the nature of the activity public services may adopt: flexible working hours, fixed working hours, different entry and leave hours service by service or professional group by professional group, continuous working hours or shift-work. Civil servants have the possibility of reducing their weekly working time is 20%; the four days workweek has a correspondent wage reduction (in 20%).

Table 19 Proportion of pupils leaving education without finishing compulsory education in Portugal and in the EU15 (early school leavers)

	1999		2000		2001		2002		2003	
	Portugal	EU15	Portugal	EU15	Portugal	EU15	Portugal	EU15	Portugal	EU15
Total	44.8	20.5 p	42.9	19.4 p	44.3	18.9 p	45.5	18.5 p	41.1	18.0 b
Females	38.8	18.4 p	35.4	17.1 p	37.0	16.6 p	38.1	16.1 p	33.8	15.9 b
Males	50.7	22.6 p	50.3	21.6 p	51.6	21.2 p	52.9	20.9 p	48.3	20.2 b

Notes: b) break in series; p) provisional value

Source: Eurostat

Although the proportion of early school leavers decreased considering the reference period, this movement does not seem to be constant. Anyway, in 2003, about half the males and 1/3 of females had left the education system without finishing the nine years of compulsory education. These figures more than double those of the EU15. If one considers the new EU25, the gap becomes even higher due to the influence of the Eastern Europe states where educational levels were and still are very high.

Table 20 Proportion of pupils leaving education without finishing compulsory education in the EU25 (early school leavers)

	2001	2002	2003
Total	17.2 p	16.5 p	15.9 b
Females	15.0 p	14.2 p	13.9 b
Males	19.5 p	18.7 p	17.9 b

Notes: b) break in series; p) provisional value

Source: Eurostat

23. Study fees as proportion of national mean net wage

From the Portuguese stand, perhaps more important than study fees would be the availability of subsidies. Only higher education has fees and the main problem regards the high proportion of those leaving education throughout pre-university education and, namely, as seen above, before finishing compulsory education. Although subsidies are considered on the remarks for the indicator, it would seem preferable to change the relative position of fees and subsidies, by giving a stronger emphasis on the latter.

In 2003/2004 the minimum fee is €463.58 and the maximum is €852. Each faculty decides the value of the fee. Considering the national mean wage in 2002 (€12425), fees amount from 3.7% to 6.9%.

Students with scholarships are exempted of payment. Only those students of households whose monthly mean income per capita (annual gross income of the household per number of elements of the household per 12 months) is lower than the national minimum wage are entitled to a scholarship from the central State.

To the monthly income some amounts may be deduced after evaluation, namely the expenses with a housing rent or mortgage, up to the limit of 30% of total income, and the expenses resulting from a long-term or chronicle illness of any of the members of the household possibly affecting income.

There are other scholarships, from City Councils obeying to the same rules, and from some private institutes, these ones relating namely to excellence. The maximum amount of the scholarship equals the value of the national minimum wage.

Dislocated students are entitled to be lodged on a university residence. If it is not possible to lodge an entitled student, he/she is entitled to a surplus of 25% to 35% of the scholarship.

Regarding primary and secondary schooling, low-income students are entitled to a subsidy for books and schooling materials (or to 50% of these costs) and exemption (or 50% discount) of payment of meals in the school canteen, according to placement in category A or category B.

2.6.2 Quality of education

24. Proportion of students who, within a year of leaving school with or without certificate, are able to find employment

One of the major issues regarding the Portuguese educational system is the nearly absence of professional courses within regular schooling qualifying individuals for performing a whole range of professional activities. In almost all schools, current schooling provides general preparation for the entrance in higher education. As a result, those finishing the 12th year of education (the end of secondary level) do not have any particular expertise and, more importantly, do not have any advantage (in strict professional terms) regarding those finishing only compulsory schooling (9th year). Of course that this brings along a strong devaluation of schooling from those who do not want to proceed to higher education. By joining to this set the poor socio-economic situation of a significant part of the Portuguese population, the demands for extra-salaries and for consumption, namely among youngsters, it becomes easier to understand the Portuguese situation regarding education. Specifically regarding the proposed indicator, it is sometimes easier to find a job with the 9th grade than with the 12th. The latter, on the one hand, have higher expectations. Employers, on the other, sometimes prefer to employ the former, saving on salaries and avoiding possible higher demands, namely in sectors where qualification (due to the mentioned failure of schooling) derives only from experience.

Regarding the indicator, unemployment rate of college graduates of 94/95, 18 months after graduation, was 4.7% and the average period for obtaining a first job was 6 months. Comparing with the unemployment rate for the fourth quarter of 1996 for the total population and the population aged 25 to 34, the better situation of college graduates becomes evident.

Table 21 Unemployment rate of college graduates of 94/95, 18 months after graduation, and unemployment rate of total population and the population aged 25 to 34 in the fourth quarter of 1996

	Males	Females	Total
Graduates 94/95*	3.1	5.6	4.7
Population aged 25-34**	7.3	8.7	8.0
Total population**	6.5	8.2	7.3

Source: * OEVA (Observatory on entrance in active life)

** INE, Estatísticas do Emprego (Employment Statistics)

2.7 Trends and reflection

The 1974 Revolution, ending 48 years of Fascist regime is the Portuguese historical mark of the last decades. The situation, today, is the result of the developments in the last 30 years but the legacies of the Fascist period are still evident in all or almost all domains of socio-economic security.

The Portuguese Social Security System – in its present formulation of universal entitlement of rights – dates back to the 1974 Revolution, although the Social Security Basic Law was published only in 1984. The harsh situation of a considerable part of the elderly, for instance, derives from the fact that pensions are rather low, often drawing from the non-contributive system, as before 1974, contributions for Social Security were an exception, rather than a rule. However, in spite of its youth, the Social Security System has already been faced with its own financing crisis.

Social assistance has been characterised by different forms of discretionary behaviours. Granting benefits is strongly dependent on the subjective evaluation of social workers. Under this scope, the issue of the “deserving poor” and the “non-deserving poor” is clearly pertinent.

Some groups of population still remain out of range of most benefits, given the eligibility criteria established in order to have access to those benefits. The homeless are an evident example. Given their situation, their access is strongly limited, either by their “withdraw from the world”, and/or by the way the “others” face them.

These, among other reasons, raise the issue of how universal the system actually is. Only in the late 1990s, with the implementation of the Guaranteed Minimum Income (now Insertion Social Income), the only benefit granted as a right within Social Assistance, has it been possible to reduce that discretionary character of the system and implement its universality.

But even the Insertion Social Income (RSI) does not reach every person. This benefit is divided in two components. The one is pecuniary and the other consists of an insertion programme. The insertion programme, based almost exclusively on the integration on the labour market, must be complied in order to maintain the pecuniary benefit. Again considering the homeless (but also other extremely vulnerable populations), this is very difficult to achieve and most individuals experiencing

homelessness (rough sleeping) are not acceding the Insertion Social Income, either for not at all having applied or for not having fulfilled obligations at some stage.

Poverty in Portugal is related to the Welfare State frailties and above all to the low level of benefits it provides, as well as to the existence of flaws in the Social Security System, which for a long time, left totally unprotected entire groups of population who, for various reasons, were not entitled to any social benefit.

Poverty in Portugal has been decreasing in the last years. In spite of that, poverty rate after transfers remains the highest in the context of the EU15, even if poverty rate before transfers, although higher than the European average, is lower than rates in Sweden or Ireland.

Housing also had a strong impact with the Revolution, after which rents were frozen for several years. This situation still has impacts today as a significant part of the rentals come from that time and the amount of those rents is much below the market prices. However, the Portuguese housing market is rather dual. Rental market has been decreasing in importance. New rents are as expensive, or even more expensive than mortgages thus leading people to buy accommodation instead of renting.

Housing conditions have increased considerably throughout the last decades. As examples, from 1991 to 2001 the proportion of dwellings without running water in its interior has decreased from 10.4% to 2.1% and the proportion of dwellings without bath or shower from 18.2% to 6.3%.

Education also reflects recent Portuguese history. From 1974 onwards there has been a strong increase on schooling levels. Nevertheless, in general terms, Portugal has rather low educational levels. In 2001 26.4% of the population had no academic qualification (it comprises illiterates and those who are not illiterate though they have not completed 4 years of schooling), 27.8% only had completed four years of schooling and 81.8% had completed, at the most, nine years of schooling (which is presently the threshold for compulsory schooling) (INE, Recenseamento Geral da População e Habitação). Although registering a tendency for decreasing, even today about half the males and 1/3 of females leave the education system without finishing compulsory education, figures that more than double European averages.

Training is another debility. According to data from the Third European Survey on Working Conditions, more than half of the Portuguese respondents had not undergone any training. Those who have undergone training had 10.7 days in average. However, a quarter of the workers had 2 days of training and the median was set at 5 days of training.

Regarding labour, throughout recent years, Portuguese activity and employment rates have been consistently higher than those for the EU15. In 2000, and considering the females, Portuguese rates were about ten points higher than those of the EU15 (55.9% vis-à-vis 47.4% in terms of activity rate;

53.9% vis-à-vis 43.2% in terms of employment rate). Between 1998 and 2000 these rates grew around 1% per year.

3 Social Cohesion

3.1 Introduction

It was mentioned earlier (see general introduction) that the totalitarian fascist state promoted an image of a cohesive society. Here, the way social cohesion is defined, under the social quality theory, i.e. “the degree and quality of social relations between people based on shared norms and values in society”⁷ helps dismantling such construction. Norms and values were forcedly shared and little quality could result from such a process.

The difficulty to mobilise civil society is a challenge deriving from the past. But cohesion in Portugal also faces new challenges: the move towards an immigration society or the fading of “southern traditional” kinship solidarities.

In the following paragraphs, the Portuguese situation - and its comparative European stand - regarding social cohesion and its evolution is dealt with, through its domains and indicators.

3.2 Trust

3.2.1 Generalised trust

25. Extent to which ‘most people can be trusted’

The European Values Study report has no data for Portugal regarding this issue. Thus we use the European Social Survey.

Table 22 Would you say that most people can be trusted or that you cannot be too careful in dealing with people?

0 – you can't be too careful	7.7
1	5.1
2	10.8
3	17.6
4	12.5
5	21.5
6	8.9
7	7.6
8	4.3
9	1.5
10 – Most people can be trusted	2.5

Source: European Social Survey, 2002

⁷ Berman, Y., Philips, D. (2004), Indicators for Social Cohesion, 5th draft, EFSQ working paper, Amsterdam.

Not surprisingly, people tend to state intermediary values. Nevertheless, a strong propensity to carefulness may be identified. More than half of respondents (53.7%) think that most people are distrustful (categories 0-4) and only one in each four respondents tend to think that most people can be trusted (categories 6-10).

3.2.2 Specific trust

A risk of being too much data led is to report on indicators, for which there is data but that are not completely adequate to the initial purposes. We believe that this risk is evident on indicator(s) 28. Stating importance is not the same as trust. The latter is more directional, while the former is rather abstract. Indicator 27 may be important but it is necessary to introduce a weight. Having, for instance, the number of new cases submitted by Portugal and the EU15 by themselves does not say much. Weight by total population, for instance, is therefore essential.

26. Trust in: government; elected representatives; political parties; armed forces; legal system; the media; trade unions, police; religious institutions; civil service; economic transactions

Table 23a Trust in institutions

	A great deal		Quite a lot		Not very much		Not at all	
	Portugal	Total	Portugal	Total	Portugal	Total	Portugal	Total
Parliament	5.2	5.0	44.0	30.6	37.5	44.0	13.4	20.5
Armed forces	16.2	13.2	54.7	43.3	23.5	33.3	5.7	10.2
Justice system	4.8	8.3	35.8	36.5	37.9	39.1	21.5	16.1
Press	11.4	4.9	54.3	33.9	28.0	46.0	6.4	15.2
Trade unions	6.7	4.9	40.3	30.3	38.9	44.8	14.1	20.0
Police	14.4	11.9	51.1	44.3	25.6	32.1	8.8	11.6
Church	35.1	19.3	44.8	34.5	14.7	30.2	5.4	15.9
Civil service	3.3	4.2	50.3	35.5	36.9	45.7	9.5	14.6
Major companies	4.9	4.0	47.9	31.4	35.5	44.5	11.7	20.1

Table 23b Trust in political institutions

	Tend to trust		Don't know		Tend not to trust	
	Portugal	Total	Portugal	Total	Portugal	Total
Political parties*	16.0	16.0	5.0	8.0	79.0	76.0
Government*	34.0	30.0	4.0	9.0	62.0	61.0

Note: The source for the instances marked with an asterisk is Eurostat's Eurobarometer 61.

Source: European Values Study, 1999/2000

Regarding institutions, the first striking aspect is the mistrust of the Portuguese in the Legal system. There is a feeling in the Portuguese society that most "white-collar" crimes remain unpunished, either by not being judged, either by the long bureaucratic processes leading, most of the times, to the ending of the legal period without the cases being brought to court.

Church, on the other hand, is the trustworthiest institution, reflecting the strong religiosity still present in the Portuguese society. Besides, regarding the two extreme categories, this is the institution regarding which the biggest differences, between Portuguese and the “total” opinions, occur. In general, with the exception of the justice system, Portuguese tend to be more trustful regarding the selected institutions than the average of the countries represented in the study.

27. Number of cases being referred to European Court of Law

Table 24 Completed cases – judgements concerning failure of a Member-State to fulfil its obligations: outcomes (2003)*

	Infringement declared	Action dismissed	Total
Portugal	2	1	3
EU15	77	9	86

* the figures given (net figures) represent the number of cases after joinder on the grounds of similarity (a set of joined cases=one case)

Source: Court of Justice of the European Community: tables and statistics (<http://curia.eu.int/en/instit/presentationfr/rapport/stat/st03cr.pdf>)

Table 25 New cases - actions for failure of a Member-State to fulfil its obligations (1999-2003)

	Portugal	EU15
1999	13	162
2000	10	157
2001	7	157
2002	10	168
2003	10	214

Source: Court of Justice of the European Community: tables and statistics (<http://curia.eu.int/en/instit/presentationfr/rapport/stat/st03cr.pdf>)

28. Importance of: family; friends; leisure; politics; respecting parents. Parents’ duty to children

Table 26 Importance of family, friends, leisure and politics

	Very important		Quite important		Not important		Not at all important	
	Portugal	Total	Portugal	Total	Portugal	Total	Portugal	Total
Family	84.3	84.4	14.4	13.2	1.3	1.9	0.0	0.5
Friends	30.5	40.1	57.4	48.2	11.7	10.6	0.4	1.1
Leisure	20.2	32.2	63.5	49.1	15.5	16.1	0.8	2.6
Politics	4.6	7.2	22.5	26.3	36.9	41.9	36.0	24.6

Source: European Values Study

The Portuguese tend to be less enthusiastic regarding almost all comprised instances, although the proportion of those stating importance (very+quite) is quite similar. Family is, undoubtedly, the most important instance in people’s lives, both in Portugal and the other countries surveyed in the European Values Study.

Table 27 Respecting parents

	Portugal	Total
Regardless of what the qualities and faults are of ones parents, one must always love and respect them	82.6	71.7
One does not have the duty to respect and love parents who have not earned it by their behaviour and attitudes	17.4	28.3

Source: European Values Study

In spite of this, Portuguese respondents tend to state an “abstract” respect towards parents, where respect may be due exclusively to the fact of being parents. On the other hand, though, Portuguese tend to demand more from parents than the average.

Table 28 Parents’ duty to children

	Portugal	Total
Parents’ duty is to do their best for their children even at the expense of their own well-being	79.7	68.8
Parents have a life of their own and should not be asked to sacrifice their own well-being for the sake of their children	14.6	20.8
Neither of the previous	5.6	10.4

Source: European Values Study

3.3 Other integrative norms and values

3.3.1 Altruism

These seem to be good indicators for altruism.

29. Volunteering: number of hours per week

Voluntary work is far less common in Portugal than the average of the countries surveyed by the EVS. Women’s groups and peace movements are the less participated in Portugal, as in general but in the former case it refers a minimal proportion of people. Sports/recreation groups are the main entities where Portuguese do voluntary work.

Table 29 Doing unpaid voluntary work for:

	Portugal	Total
Social welfare services for elderly, handicapped or deprived people	0.8	3.9
Religious or church organisations	2.6	5.8
Education, arts, music or cultural activities	2.3	4.8
Trade unions	0.3	2.8
Political parties or groups	0.5	1.9
Local community actions on issues like poverty, employment, housing, racial equality	0.6	2.0
Third world development or human rights	0.6	1.3
Conservation, the environment, ecology, animal rights	0.4	1.9
Professional associations	0.6	1.9
Youth work	0.9	2.9
Sports or recreation	4.3	6.6
Women's groups	0.1	1.3
Peace movements	0.1	0.7
Voluntary organisations concerned with health	1.0	2.3
Other groups	2.5	3.5

Source: European Values Survey

European data available (European Values Survey) does not comprise the number of hours per week in voluntary activities. As such, we decided to include national data of the Time Use Survey, from where it is possible to see that 15.5% of the Portuguese population engages in civic activities (namely religious) and volunteering dedicating, in average, 1 hour and 44 minutes to it. A much higher proportion of women participate in such activities but there is almost no difference regarding the amount of time dedicated by males and females.

Table 30 Average duration and participation rate of civic activities and volunteering of the population aged 15 or more on an average day, by sex

	Total population			Population who performed			Participation rate		
	Total	Males	Females	Total	Males	Females	MF	M	F
Civic activities and volunteering	0h16m	0h10m	0h21m	1h44m	1h46m	1h43m	15.5	9.9	20.5

Source: INE/Inquérito à Ocupação do Tempo (Time Use Survey), 1999

30. Blood donation

In 2002, only 22% of the Portuguese population decided to donate their blood, against 31% in the EU15.

Table 31 Blood donation (%), 2002

Portugal	22
EU15	31

Source : « Le don de sang », Eurostat, 2003, p.2, Eurobarometer 58.2

3.3.2 Tolerance

The two proposed indicators are valuable from the Portuguese stand. However, it seems essential to know clearly what is in stake in each indicator. The wide formulation of the indicators opens space for a lot of “sub-indicators”. Although the indication of sources, namely the questions of EVS, narrows possibilities, there are still a lot of sub-indicators. Shall they all be considered? Despite this fact, we decided to include national data, offering different insights on these issues.

31. Views on immigration, pluralism and multiculturalism

Minorities in Portugal tend to consider that, most of the times, there is a “concealed” racism, that the Portuguese are not openly racist but denote racist attitudes. The results of Eurobarometer seem to confirm this. Portuguese attitudes toward minorities seem to be less clear than in the EU15. Indeed, only 9% denote an intolerant attitude towards minorities but likewise, only 12% are actively tolerant, while ambivalence is a characteristic of more than 1/3 of the Portuguese, comparing with 1/4 of the EU15 respondents.

Table 32 Typology of people according to their attitudes towards minorities

	Intolerant	Ambivalent	Passively tolerant	Actively tolerant
Portugal	9	34	44	12
EU15	14	25	39	21

Source: Attitudes towards minority groups in the European Union by Thalhammer et al. Based on Eurobarometer 2000 survey

The Portuguese ambivalence (as well as concealed racism) seems to be reflected in the next table. Instead of defending a strict limit on the number of foreigners, the majority of Portuguese respondents connect the coming of immigrants with the vitality of the labour market. Immigrants are thus welcome as “*homus economicus*”, to fulfil jobs available, which have not been occupied by Portuguese.

Table 33 What the government should do regarding people from less developed countries coming here to work, Portugal and Total EVS countries

	Portugal	Total
Anyone come who wants to	11.5	7.6
Come when jobs available	61.4	38.5
Strict limits on the number of foreigners	23.2	43.7
Prohibited people to come here	3.9	10.2

Source: European Values Study

This kind of perspective is, at the present time, reflected on the Portuguese immigration law. This law frames immigration under permanence permits, valid for a period of one year, renewable up to a maximum of five years, allowing immigrants to linger and work in Portugal but not granting a residence permit. This has, of course, implications on the medium-long term regarding the permanence of these individuals in Portugal. As Felice D’Assetto puts it “we asked for arms but men showed up” (free translation).

The Portuguese tend, however, to agree with the granting of rights to those immigrants already present in Portuguese territory.

Table 34 Proportion agreeing with:

Proportion of the population agreeing with....	
Granting the same rights as the Portuguese abroad	97.2
Possibility of family recomposition	93.0
Facilitation of naturalization	84.0
Legalisation of illegals	79.7
Illegals must be kept under surveillance	72.7
Immigrants commit more crimes than Portuguese do	30.0
Immigrants are fundamental for Portuguese economic life	40.4

Source: LAGES, Mário; POLICARPO, Verónica (2003), *Atitudes e Valores perante a Imigração*, Lisboa, ACIME.

On the other hand, when confronted directly with the coming of more immigrants to Portugal, about 3 in each 4 reject that idea.

Table 35 Proportion disagreeing with the coming of more (...) immigrants to Portugal?

	Total	Males	Females
African	74.4	72.1	75.8
Brazilian	71.7	68.5	73.8
Eastern Europe	73.4	70.0	75.6

Source: LAGES, Mário; POLICARPO, Verónica (2003), *Atitudes e Valores perante a Imigração*, Lisboa, ACIME.

Portuguese seem to have a more multiculturalist approach than the total EVS surveyed populations. Nevertheless, a bit more than half the Portuguese tend to agree with a more assimilationist approach.

Table 36 Openness of mind towards immigrants' customs and traditions

	Portugal	Total
For the greater good of society it is better if immigrants maintain their distinct customs and traditions	48.9	41.9
For the greater good of society it is better if immigrants do not maintain their distinct customs and traditions but take over the customs of the country	51.1	58.1

Source: European Values Study

32. Tolerance of other people's self-identity, beliefs, behaviour and lifestyle preferences

If, regarding immigration, the Portuguese seem to be somewhat more open than average, regarding other people's self-identity, beliefs, behaviour and lifestyle preferences, this openness seems to be wider. Puzzling is the comparatively high proportion of people stating their dislike for Jews as neighbours. According to the last Census (2001) only 1.773 people over 14 years of age (0.02%) affirmed themselves followers of Judaism. Some Anti-Semitism seems to be present even in a context of residual presence of Jew population. On the other hand, the high proportion of people stating their

dislike for gypsies, if surprising is for not being higher. Historically (Gypsy presence in Portugal dates back to the 15th century), the relationship with this community has not been easy.

Table 37 Who would you not like to have as neighbours?

	Portugal	Total
Criminal record	43.9	50.9
Different race	7.6	12.8
Left wing extremists	10.5	32.1
Heavy drinkers	38.2	59.9
Right wing extremists	12.0	36.8
Large families	5.0	9.4
Muslims	7.9	19.7
Homosexuals	25.2	35.1
Jews	10.8	12.1
Gypsies	36.5	40.2

Source: European Values Study

However, while commenting on the justification of some behaviours and preferences, the Portuguese only contemporise a little more regarding the taking of marijuana/hashish.

Table 38 Tolerance: From 1 (never) to 10 (always), when can (...) be justified

	Portugal	Total
Taking marijuana or hashish	2.02	1.83
Homosexuality	3.19	4.30
Abortion	3.81	4.58
Divorce	5.46	5.51

Source: European Values Study

3.4 Social contract

As stated in the third draft paper, social cohesion consists of the bonding effect within a society that arises spontaneously from the unforced willingness of individual members of society to enter into relationships with one another in their efforts to survive and prosper (Stanley, 1999). From this point of view, it seems essential to count with indicators aiming specifically on willingness.

However, if an indicator on the willingness to improve the situation of the poor does not need further explanation, the need for a similar indicator relating to the elderly is not that straightforward. From the Portuguese stand this is a good indicator as the situation of elderly in Portugal is generally speaking, a poor one. But this is not the case in several European countries as research had the chance to demonstrate (please see Barnes, M., C. Heady, S. Middleton, J. Millar, F. Papadopoulos and P. Tsakoglou (2002), Poverty and social exclusion in Europe, Cheltenham, Edward Elgar).

33. Beliefs on causes of poverty: individual or structural

Table 39 Population considering unluckiness, laziness, injustice and the modern progress as the most important reason for living in need

	Unluckiness	Laziness or lack of willpower	Injustice in society	Part of the modern progress	None of these
Portugal	23,3	41,9	21,6	11,6	1,6
Total	15.5	24.1	33.9	22.8	3.7

Source: European Values Study

Considering unluckiness, laziness and lack of willpower as the main reason for a person to live in need is an entrenched belief in Portuguese society, not only among those deprived but also among some of the social workers dealing with this population (see, for instance, Baptista, I.; Perista, H.; Reis, A. L., (1995), *A pobreza no Porto: representações sociais e práticas institucionais*, Porto, REAPN and Capucha, L. (coord.) (1996), *ONG's de solidariedade social: práticas e disposições*, Porto, REAPN).

34. Willingness to pay more local taxes if you were sure that it would improve the situation of the poor

No data was found regarding this indicator.

35. Intergenerational: willingness to pay more taxes in order to improve the situation of elderly people in your country.

No data was found regarding this indicator.

36. Willingness to actually do something practical for the people in your community/neighbourhood (picking up litter, doing some shopping for elderly/disabled/ill people in your neighbourhood, assisting neighbours/community members with filling out forms, cleaning the street/porch/doorway)

No data was found regarding this indicator.

37. Division of household tasks between men and women: do you have an understanding with your husband/spouse about the division of household tasks, raising of the children, and gaining household income?

Confirming data from Time Use Survey of 1999, Torres et al (2004) state that men tend to have longer paid work activity and shorter domestic activity. Considering paid and unpaid work altogether, women tend to have a higher total workload.

Table 40 Daily number of hours spent on paid work and on domestic and care tasks, by sex (working day)

	Males	Females
Paid work (including journey)	9.0	8.1
Domestic and care tasks	1.3	3.8

Source: Torres, A. (coord.) (2004), *Homens e mulheres entre família e trabalho*, Lisboa, DEEP

Such division of domestic and care tasks is, however, considered fair, although considerable gender distinction may be detected.

Table 41 Evaluation of the degree of justice inherent to the division of domestics and care for children tasks, by sex

	Domestic tasks*		Care for children**	
	Males	Females	Males	Females
Very fair	8.6	11.3	8.5	11.0
Fair	85.2	66.3	87.6	71.6
Unfair	5.8	18.1	3.7	14.2
Very unfair	0.4	4.3	0.2	3.2
Total	100	100	100	100

Sources: *Torres, A. (coord.) (2004), *Homens e mulheres entre família e trabalho*, Lisboa, DEEP

** Own calculations on the basis of Torres, A. (coord.) (2004), *Homens e mulheres entre família e trabalho*, Lisboa, DEEP

The main stated reason for such evaluation is the higher availability of one of the members of the couple, although paid workload does not fluctuate significantly between men and women, at least to justify the gap on domestic/care workload.

3.5 Social networks

3.5.1 Networks

The domain “social networks” is probably one of the most problematic within social quality, due to its transversal relevance both to social cohesion and social inclusion. Discussion led to consensus that some indicators could be used for more than one conditional factor. Social networks are understood as nets of daily social relationships with different actors and contents and not in their original simmelian sense of social forms as such, of “pure” social contact independently of contents. It should be ensured that the four main social networks at the individual level – family, friends, colleagues and neighbours (Machado, F.L., 2002, *Contrastes e Continuidades*, Oeiras, Celta Editora) – have the same information. Therefore, it would seem useful to evaluate frequency of contact, not only with friends and colleagues, but also with family and neighbours (available at the ECHP). Likewise, support from colleagues would complete information.

On the other hand, it should be stated what kind of support is under consideration in indicator 39. Indicator 38 must encompass two “sub-indicators”, one regarding active membership and the other inactive membership.

38. Membership (active or inactive) of political, voluntary or charitable organisations

Membership rates in Portugal are, generally, low. Till a somewhat recent past (till the end of the totalitarian regime in 1974), there was a strong repression that inhibited the organisation of civil society at various levels. This situation still has its effects today. Although organisations have multiplied throughout the years, people still seem not to be completely prepared for civic action.

Table 42 Proportion of population belonging to...

	Portugal	Total
Social welfare services for elderly, handicapped or deprived people	2.0	6.1
Religious or church organisations	5,6	14.0
Education, arts, music or cultural activities	3,1	9.6
Trade unions	1,7	16.7
Political parties or groups	0,9	4.3
Local community action on issues like poverty, employment, housing, racial equality	1.0	3.0
Third world development or human rights	0,8	3.1
Conservation, the environment, ecology, animal rights	0,5	4.8
Professional associations	1,1	5.3
Youth work	1,2	3.8
Sports or recreation	8,6	15.6
Women’s groups		2.5
Peace movements	0,6	1.0
Voluntary organisations concerned with health	2,2	3.5
Other groups	3,2	5.8

Source: European Values Study, 1999

However, comparing with national sources, the figure regarding membership of trade unions does not seem accurate. The number of unionised workers is estimated to be around 1 million, thus representing about 10% of total population and 18.5% of labour force.

39. Support received from family, neighbours and friends

According to data from the Portuguese Time Use Survey, of 1999, 13% of the families had received informal help in the four weeks previous to the inquiry, mostly from family (proportions always higher than 75%). Neighbours were mentioned by 17%.

(This indicator is also analysed in Social Inclusion, indicator 71).

40. Frequency of contact with friends and colleagues

Table 43 Frequency of contact with friends and colleagues in Portugal and in the totality of countries surveyed by EVS

	Friends		Colleagues	
	Portugal	Total	Portugal	Total
Not at all	5.6	4.6	30.2	31.3
Few times a year	16.3	14.3	16.5	27.8
Once twice a month	14.5	27.5	17.8	22.8
Every week	63.6	53.7	35.4	18.1

Source: European Values Study, 1999.

Sociability regarding friends and colleagues seems to be stronger in Portugal than in the totality of the countries surveyed by EVS. This is true namely regarding colleagues since the proportion of Portuguese in contact with colleagues every week almost doubles the proportion for the total. (This indicator is also analysed in Social Inclusion, indicator 68).

3.6 Identity

Under the sub-domain “National/European Identity” it seems that indicator 41 is missing European dimension. In its present formulation, indicator 42 is not really an indicator. It is necessary to identify which national and European symbols are to be selected.

3.6.1 National/European identity

41. Sense of national pride

It would be pertinent to also include a sense of European pride, moreover when the other indicator of the sub-domain is twofolded, and the name of the sub-domain itself is “National/European identity”. There seems to be no reason to assume that European data is not reflecting the national situation. Although the Portuguese are sometimes rather mistrustful of their country, national pride seems to exist and there is no national data to substantiate or question European data. However, caution must be taken regarding this subject as Eurobarometer 60.1 states that 41% of interviewees are proud of being Portuguese and only 11% are proud of being European, figures rather different from those of Eurobarometer 60, presented in the table below.

Table 44 Sense of pride: proportion of the population proud of being Portuguese / European

	National pride	European pride
Portugal	92	66
EU15	85	61

Source: Standard Eurobarometer 60: full report (categories very and fairly proud taken together)

Sense of national pride, as well as of European pride, is more evident in Portugal than in the EU15. There is also a significant difference between those two types of pride. About two in each three Portuguese state their pride in being European while the pride of being a Portuguese national is stated by 92%.

Another source (European Values Study) confirms these results. National pride is, once again, higher among the Portuguese, although comparability in this source regards a wider range of countries. In fact, four in each five Portuguese have no problems in stating they are very proud of being Portuguese nationals, almost the double of the figure for the totality of countries surveyed in EVS. On the other end of the scale, the situation is similar with only 3.2% of the Portuguese not being proud, against 16.8% of the total.

Table 45 Sense of national pride: pride of being...

	Very	Quite	Not very	Not at all
Portugal	79.1	17.7	2.3	0.9
Total	41.7	41.5	12.7	4.1

Source: European Values Study, 1999.

42. Identification with national symbols and European symbols

According to Eurobarometer number 58, of 2002, 57% of the Portuguese identified with the European flag, vis-à-vis 43.5% of the population of the EU15, which is consistent with the results on European pride. Nationality remains, however, the main source of identification for the vast majority of the Portuguese population.

Table 46 How do you see yourself in the future?

	Portugal	EU15
As citizen of my country	51	39
As citizen of my country and European	43	47
As European and citizen of my country	3	7
As European	2	3

Source: Eurobarometer 60.1, 2003

3.6.2 Regional/community/local

43. Sense of regional / community / local identity

A referendum on the implementation of regionalisation was held in Portugal in the end of 1998 but the proposal was rejected. Hence, though there are regions within the country (in statistical and subjective terms, for instance), it is not formally divided in political-administrative units. As such, analysis of regional identity must be aware of this fact.

Being a small country probably influences the fact that there are no significant differences between the feeling of attachment of the Portuguese to the country, region or local territorial unit.

Table 47 Feeling attached to:

Portugal	62
Region	63
City, town or village	66

Source: Eurobarometer 60.1, 2003

Moreover, when requested to choose the first geographical unit of identification, 41.6% choose Portugal as a whole, proportion higher than those referring first to locality or town. This result is radically different from the scenario for the EU15, where the micro-level is the primary source of identification for half the population while only slightly more than one in each four Europeans (EU15) refer first to their country as a whole.

Table 48 Which of these geographical groups would you say you belong to first of all

	Portugal	EU15
Locality or town	36.3	49.3
Region of country	16.0	13.3
Country as a whole	41.6	27.7
Europe	1.6	3.2
World as a whole	4.5	6.5

Source: Eurobarometer 60.1, 2003

3.6.3 Interpersonal

44. Sense of belonging to family and kinship network

No data was found regarding this indicator.

3.7 Trends and reflection

Insecurity has been playing, from time to time, a focal point of the political agenda. Some political parties, namely from the right wing have raised, in a recent past, the issue as a political argument. The main concern regards petty crime, mostly associated to drug abuse, causing distress and insecurity among the population, namely among the elderly.

Abstention has been consistently rising over the years. Regarding elections for the Government, abstention was 14.6% in 1980, 31.8% in 1991, and 38.1% in 1999. In the last elections, in 2001, for the Presidency of the Republic, abstention was 49.1%. In the elections for the European Parliament, traditionally those where abstention is higher, it reached 59.7% in 1999 and 61.3% in 2004.

Recent cases highly explored by the media have certainly contributed for the already mentioned mistrust in the Legal system, namely that of "Universidade Moderna", regarding financial frauds in a private university and "Casa Pia", regarding accusations of paedophilia involving pupils of a public institution for deprived children and youngsters. Both these cases, involving prominent members of

society, namely a Minister and a former Minister, evolved in such a way that all but one of the accused were absolved, in the former case, and all the “prominent” elements were gradually released from prison while the process is being developed, in the latter. From the set of suspects, only a driver from the institution (allegedly the link between the “prominent” elements and the youngsters) is still imprisoned. However, in both cases, people were detained on suspicion for several months or even more than a year

Regarding specific trust on trade unions, the 90’s were a decade of decline on the number of union affiliates. In 15 years the number of people affiliated in CGTP-IN (the major Portuguese confederation) decreased from 1.380.900 to 765.000, in 1995-96. In its 1999 Congress, CGTP-IN deliberated to gain 200.000 new affiliates in four years. This strategy seems to have worked. It was announced in 2003 that the confederation gained 222.000 new affiliates since 1999, 60% of which women.

There is not a tradition of volunteering in Portugal. Till a somewhat recent past (till the end of the totalitarian regime in 1974), there was a strong repression that inhibited the organisation of civil society at various levels. This situation still has its effects today. Although organisations have multiplied throughout the years, people still seem not to be completely prepared for civic action.

Portugal has historically been a country of emigration. Even today a significant number of people continue to emigrate but immigration became very significant in the last 30 years and namely in the last decade. Also possibly having an influence on views on immigration, tolerance and multiculturalism is the colonial past of the country. It is considered to have been “smoother” than the one of other European countries, with higher levels of multiculturalism and miscegenation.

Law punishes abortion in Portugal and people are taken to trial due to its practice. In 1998, there was a referendum regarding the end of the penalization for the interruption of pregnancy during the first 10 weeks in a legally authorized health institution, if requested by the woman. 52% voted against the end of the penalization.

The organisation of the European championship of football in 2004 and the support for the national team led to an unprecedented valorisation and identification with the national flag which was widely used, placed in private balconies almost everywhere and also in cars. From a somewhat embarrassing situation, the display of a flag turned into a normal feature of national pride and identification.

Among many of the African origin youngsters there is a strong sense of community identity. However, this identity configures a situation of exclusion regarding the whole society.

Family is still considered as a major structuring unit. Family life is considered as extremely important.

4 Social Inclusion

4.1 Introduction

The dimension of 'access', focal point to social inclusion, is a matter where the Portuguese society still reveals clear deficits. Just the fact that about a fifth of total population is in monetary poverty has direct and severe implications in social inclusion. Besides that, the frailties identified regarding socio-economic security and also social cohesion (see sections 2 and 3), have obvious implications on the kind of access people may experience. Once again, however, the positive evolution registered for a significant part of the sub-domains must be mentioned.

In the following paragraphs, the Portuguese situation - and its comparative European stand - regarding social inclusion and its evolution is dealt with, through its domains and indicators.

4.2 Citizenship rights

4.2.1 Constitutional/Political rights

The sub-domain seems to be well supported by the proposed indicators. However, it would seem useful not to restrict the focus of indicator 46 only to local elections. Social inclusion regarding political rights is not exhausted at the local level. Besides, in this sense, inclusion at the local level may coincide with exclusion at broader levels. In Portugal, it is common that some local areas, demanding to become a municipality, choose to boycott elections, exercising political rights in this sense only at a very local level, that of the "freguesias" (minimal administrative level).

45. Proportion of residents with citizenship

According to Census 2001, developed by the National Statistical Institute, 96.6% of the resident population had Portuguese citizenship.

46. Proportion having right to vote in local elections and proportion exercising it

Law 50/96 states that EU nationals, citizens from the Portuguese speaking African countries living in Portugal with a residence permit for more than two years and all other foreigners with legal residence in Portugal for more than three years have the right to vote in local elections.

According to STAPE (Technical Secretariat for Electoral Process Affairs), 60.1% of registered electors voted in the last local elections, held in 2001.

4.2.2 Social rights

47. Proportion with right to a public pension (i.e. a pension organised or regulated by the government)

It seems useful to know of which population is the proportion taken from. Is it useful to focus on total population? Theoretically, everybody has the right to a public pension, either by old age, invalidity or having the right to social pension even if never having contributed to Social Security. This situation may change if a recent proposal of decree-law is approved. This proposal states that workers aged less than 35, with a career of contributions for Social Security of less than 10 years and a monthly salary equivalent to 10 minimum salaries or more (€3656 in 2004), are obliged to make their contributions for private schemes, thus withdrawing them from the public system and from the right to a public pension.

48. Women's pay as a proportion of men's

European comparability regarding gender pay gap is assured by data from the European Community Household Panel. However, this source has generally been considered as fully adequate for this purpose. As such, and although national data also has important limitations (it does not account for the whole civil service sector, where the gap is much lower or even inexistant), it seems important to present it, in order to obtain a more complete insight.

According to the ECHP, gender pay gap is lower in Portugal than in the EU15, although it doubled in only two years. Caution must be taken while interpreting, as this may not take account for full-time or part-time schedules. Thus, in countries such as Portugal, where women usually work full-time, the gap will tend to be lower than in countries where a significant proportion of women work part-time.

Table 49 Gender pay gap in Portugal and in the EU15

	1999	2000	2001
EU (15 countries)	15	16	16
Portugal	5	8	10

Source: Eurostat, free data, employment

Using national data, and according to the Ministry of Labour and Solidarity, (DETEFP/MTS – Quadros de pessoal, 2000), gender pay gap was 22.4 in terms of average basic wage and 26.1 in terms of average earnings. The explanation for such a difference between European and national data probably resides in the above-mentioned absence of civil service sector from national data. Thus, comprising only private sector, the gap is significantly higher.

However, it must be noted that, according to national data, there was a decrease in gaps between 1999 and 2000, since in the former year the gap was 23.5 in terms of average basic wage and 27.4 in terms of average earnings

4.2.3 Civil rights

These seem relevant indicators for assessing civil rights from a social quality point of view.

49. Proportion with right to free legal advice

No data was found regarding this subject.

50. Proportion experiencing discrimination

According to the European Social Survey (2002), 2.2% of respondents stated they were members of a group discriminated in the country.

4.2.4 Economic and political networks

51. Proportion of ethnic minority groups elected to national and regional parliaments and appointed to boards of private companies and foundations

It is forbidden by Portuguese law to have the reference of the individual's ethnic group.

52. Proportion of women elected to national and regional parliaments and appointed to boards of private companies and foundations

In 2001, the proportion of women in Portuguese parliament was similar to the EU15 average.

However, in terms of government, the gap was significant.

Table 50 Proportion of women in national government and parliament, 2001

	Government	Parliament
Portugal	9,8	20
EU15	24,7	20,5

Source: Europäische datanbank Frauen in Führungspositionen (www.db-decision.de)

In the new government, initiating activity on the 19th July 2004, the proportion of women is 13.8%.

The proportion of women in the regional parliaments is lower than in the national parliament but there is radical difference between the two regions since the proportion of women in the parliament of the Azores is less than half of the proportion of women in the parliament of Madeira.

Table 51 Proportion of women in the regional parliaments of Azores and Madeira, 2000

	Regional parliament
Azores	7.7
Madeira	16.3

Source: CIDM (2002), Igualdade de género – Portugal 2002, Lisboa, CIDM.

According to the Relatório sobre a igualdade entre homens e mulheres 2004 (Report on equality between men and women 2004), the proportion of women in managements posts was around 30%, in 2002, both in Portugal and the EU15. Considering that the feminisation rate of employment in Portugal

for the same year was over 45%, this represents clearly an under-representation of women in management posts.

4.3 Labour market

4.3.1 Access to paid employment

It seems strange not to consider unemployment rates. It is essential to understand social inclusion and the social quality of a society. As it is an extremely sensible indicator it may track social quality changes on the short-term, unlike most other indicators of this conditional factor. Moreover, it reveals important variations according to sex, region and age groups, differentiations that this research aims to pinpoint.

53. Long-term unemployment (12+ months)

Over the reference period (1999-2001), long-term unemployment in Portugal accompanied the European (EU15) decreasing trend keeping, at the same time, Portuguese figures as half the EU15 figures. More recent - out of the reference period - data, however, shows that the last years promoted an increase in long-term unemployment, now a countertrend of the situation in the EU15.

Table 52 Long-term unemployment rate in Portugal and the EU15, by sex (1999-2003)

		1999	2000	2001	2002	2003
EU15	Total	4.0	3.5	3.1	3.1	3.3
	Males	3.3	2.9	2.7	2.7	2.9
	Females	4.7	4.2	3.7	3.6	3.7
Portugal	Total	1.8	1.7	1.5	1.8	2.2
	Males	1.5	1.4	1.2	1.4	1.8
	Females	2.1	2.1	1.9	2.2	2.6

Source: Eurostat: free data, social cohesion

In 2001, according to Eurostat, long-term unemployment represented 37.7% of total unemployment in Portugal, while in the EU15 it represented 42.5%. National data for 2003 (INE, Estatísticas do Emprego) allows for gender distinction. Thus, in the end of the year, long-term unemployment represented 39.6% of total unemployment, 34.9% for males and 40.4% for females.

54. Involuntary part-time or temporary unemployment

Involuntary part-time is higher in Portugal than in the EU15. However, analysis by sex shows rather different situations in the two contexts. While in the EU15 involuntary part-time is mostly a male situation, in Portugal it is the opposite, with females being much more affected. The explanation for this probably derives from the fact that, unlike other countries, in Portugal, female dominant working pattern is full-time, thus turning part-time work (significant but nonetheless representing half of the EU15 average) into an involuntary but sometimes only choice.

Table 53 Percentage of persons in employment working part-time and involuntary part-time work in Portugal and in the EU15, by sex, 2002

	Working part-time		Involuntary part-time	
	EU15	Portugal	EU15	Portugal
Men	6.6	7.1	19.0	13.1
Women	33.5	16.4	12.8	20.4
Total	18.2	11.3	14.1	17.9

Source: Eurostat, Labour Force Survey

Presuming there is a mistake on the formulation of the indicator and assuming that interest is on temporary employment, it is possible to see that temporary employment is higher in Portugal than in the EU15, affecting mainly women.

Table 54 Percentage of employees with a fixed term contract in the EU15 and Portugal, by sex, 2002

	EU15	Portugal
Men	12	20
Women	14	23

Source: « Living conditions in Europe », Eurostat, 2003, p.46

4.4 Services

4.4.1 Health services

55. Proportions with entitlement to and using public primary health care

This indicator partially overlaps with indicator 10 of socio-economic security. No data was found regarding the proportion of people using primary health care.

4.4.2 Housing

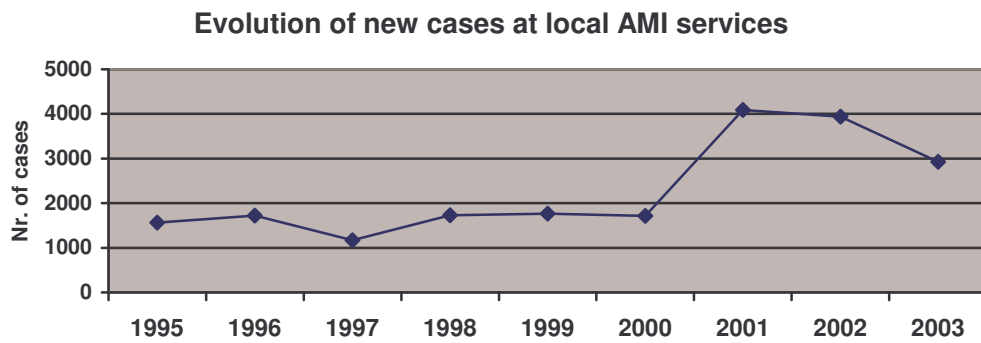
56. Proportion homeless, sleeping rough

There is no official data on the number of homeless in Portugal. For the city of Lisbon the number of homeless is estimated in 1300. The total population of the city, in 2001, was 564.657. Thus, the homeless would represent 0.23% of the population of Lisbon.

Resorting to data from AMI (International Medical Assistance)⁸, it is possible to see that in the first years of the reference period – 1999 and 2000 – there is a stability in the number of new cases at local AMI services, always less than 2000 individuals.

⁸ Accounting mainly for homeless but also to other disadvantaged people.

Figure 1 Evolution of new cases at local AMI services



Source: Baptista, I. (2004), Portuguese National Report 2004, CESIS, European Observatory on Homelessness/Feantsa

In 2001 and 2002, the figure shoots up to more than 4000 new cases and in 2003, in spite of a significant decrease, the figure remains close to 3000, which is clearly higher than the figures reported for 1999 and 2000. This evolution connects directly with the boom of Eastern Europe immigrants resorting to the services and to the opening, in 2003, of specific services addressed to immigrants.

57. Average waiting time for social housing

This indicator does not make much sense in the Portuguese context. Social housing in Portugal is almost exclusively related to the re-housing of people living in shantytowns. Re-housing schemes are developed at the local level, by municipalities and different municipalities have very different timings. In 1998, social housing accounted only for 3.7% of all accommodations in Portugal. The highest incidence of social housing was in the city of Lisbon, where accounted for 9.5% of accommodations.

4.4.3 Education

58. School participation rates and higher education participation rates

Participation rates in education are considerably lower in Portugal than in the EU15. Only by the ages of 19-20 Portuguese rates are similar to EU ones.

Table 55 Participation in education in the EU15 and Portugal, by age (16-20) and by sex (16-18), in the schooling year of 2000/2001

	EU15	P
Participation rates by age		
3-4*	67.8	66.4
5-14*	98.5	106
16	93	81
17	84	74
18	74	66
19	59	56
20	48	47
Participation rates (16-18 year olds) by sex		
Males	82	70
Females	85	77

Source: Living conditions in Europe », Eurostat, Migration statistics, 2003, p.30

* OECD, Education at a glance, 2004 (year of reference=2001).

Note: Mismatches between the coverage of the population data and the student/graduate data mean that the participation/graduation rates for those countries that are net exporters of students may be underestimated and those that are net importers may be overestimated.

In 2000/2001, according to preliminary data of the Estatísticas da Educação (Statistics of Education) and only considering Mainland Portugal, there were 494.105 pupils in the 1st cycle (1st to 4th grade), 256.547 in the 2nd cycle (5th and 6th grade) and 388.750 in the 3rd cycle (7th to 9th grade), thus totalising 1.139.402 pupils in primary schooling. The same source states that in 2001/2002 there were 371.567 pupils in secondary education and 389.957 in higher education.

4.4.4 Social care

59. Proportions of people in need receiving (public and private) care services

It does not seem to be an advantage to restrict this indicator to those “in need” if this relates to some kind of monetary or similar evaluation. Indicators in Portugal reflect coverage rates. Thus, it comprises those “in need”, if this refers on those needing the services.

Portugal is on a unique situation in the context of the European Union, regarding the relationship between employment and the level of provision of the services and equipment of support to the families. In fact, although there is a high percentage of workers (especially female workers) with small children, the level of provision of social services and equipment is rather small.

Table 56 Coverage rates for children and for the elderly

Children	(%)
Crèches and nannies*	15.4 (2001)
Pre-school education**	73.8 (2001-2002) 76.0 (2002-2003 estimation)
Free time activities centres***	12.4 (1998)
Elderly***	(%)
Residential homes	3.5 (1998)
Day care centres	3.2 (1998)
Conviviality centres	2.1 (1998)
Home care support	2.6 (1998)
Total	11.4 (1998)
Total	11.6 (2000)
Total	8.9 (2001)

Sources:

* DEPP/MSST, Carta Social – Rede de Serviços e Equipamentos. Relatório 2001

** Source: DAPP/Ministério da Educação

*** DEPP/MSST, Carta Social – Rede de Serviços e Equipamentos. Relatório 2000 and 2001

60. Average waiting time for care services (including child care)

No data was found regarding this indicator.

4.4.5 Financial services

Access to credit is indeed a difficulty for a significant part of the population. However, first of all, it would be useful to differentiate between different kinds of credit. It is not the same to discuss about a denied credit for a house or for a TV. It could also be useful to have an indicator on access to micro-credit, since it is intended, in its origin, as a way to overcome difficulties in acceding regular bank credit.

61. Proportion denied credit

No data was found regarding this indicator.

62. Access to financial assistance / advice in case of need

Social Security has social services. According to legal regulations, social services' main objectives are to prevent and support situations of deprivation and socio-economic inequality, dysfunction, exclusion and vulnerability. It also aims to integrate individuals and the development of their capabilities. Social services provide benefits in kind, and pecuniary benefits in exceptional and non-systematic conditions. Also according to Social Security, these services are subject to an "evaluation of socio-economic condition".

There is also RSI – Rendimento Social de Inserção (Social Revenue for Insertion), consisting of a pecuniary benefit and of an insertion programme. All those individuals and families in "severe economic deprivation" are entitled to such benefit. Such condition is considered to exist when:

Individuals have a monthly income lower than the value of Social Pension (€151.84 in 2004);

Households whose income is lower than the sum of the following values:

- a) 100% of the value of Social Pension, per adult, up to 2 adults;
- b) 70% of the value of Social Pension, per adult, from the 3rd adult onwards;
- c) 50% of the value of Social Pension, per minor, up to 2 minors;
- d) 60% of the value of Social Pension, per minor, from the 3rd minor onwards;
- e) In case of pregnancy of the holder of the revenue (or of the spouse/companion), a surplus of 30% during pregnancy and 50% during the first year of the child is added to the amount predicted in a).

Other relevant conditions for attribution are:

- a) To reside legally in Portugal;
- b) To subscribe and accomplish the insertion programme;
- c) To provide the documents necessary to establish the condition of severe economic deprivation;
- d) To be aged 18 or more, or less in case of pregnancy or if there are dependent minors.

The Portuguese Association for the Defence of the Consumer (DECO) has a service (open only for its associates) providing advice for over indebted people and playing an intermediary role between people and the creditors.

4.4.6 Transport

63. Proportion of population who has access to public transport system

A definition of access should be provided otherwise it is impossible to state proportions. On the limit, everybody has access, more or less difficult, to public transport system.

64. Density of public transport system and road density

No data regarding density of public transport system was found.

Within reference years, road density in Portugal increased due to investments in motorways. 10-15 years ago there was a poor coverage in terms of motorways. Since then strong investments have been made (mainly resorting to European funds).

Table 47 Kilometres of road (and specifically motorways), in Mainland Portugal, by district (1999-2001)

Mainland Districts	2001		2000		1999	
	Total	Of which motorways	Total	Of which motorways	Total	Of which motorways
Continente - <i>Mainland</i>	12 010	1 660	11 835	1 482	11 991	1 441
Aveiro	515	122	501	113	539	111
Beja	898	59	853	-	853	-
Braga	717	77	717	78	761	78
Bragança	559	-	559	-	596	-
Castelo Branco	571	41	570	35	588	35
Coimbra	716	91	691	62	726	62
Évora	910	122	903	122	928	122
Faro	685	95	689	95	676	86
Guarda	650	-	649	-	640	-
Leiria	570	135	511	87	532	82
Lisboa	750	238	749	237	749	237
Portalegre	680	36	679	36	655	36
Porto	678	181	687	181	710	179
Santarém	685	154	645	132	617	109
Setúbal	828	189	841	191	853	191
Viana do Castelo	406	71	404	70	373	70
Vila Real	462	-	462	-	457	-
Viseu	730	49	725	46	737	46

Source: INE, Anuário Estatístico de Portugal 2003

4.4.7 Civic/Cultural Services

These seem good indicators for this sub-domain, although this latter should be referred to as “civic/cultural/sporting services”, in order to encompass indicator 65 properly.

65. Number of public sport facilities per 10.000 inhabitants

No data was found regarding this indicator.

66. Number of public and private cultural and civic facilities (eg. cinema, theatre, concerts) per 10.000 inhabitants

According to the Portuguese Statistical Office (INE, Estatísticas da Cultura, Desporto e Recreio), in 2002 there were 0.245 cinemas and 1.1 seats per 10.000 inhabitants, corresponding to 93 inhabitants per seat. Also according to INE (Anuário Estatístico, 2001) there were also (all per 10.000 inhabitants) 13.2 live shows, 7.2 theatre performances, 0.234 museums and 0.556 art galleries and other temporary exhibition spaces, with 4.7 exhibitions.

4.5 Social Networks

This domain is well covered by the proposed sub-domains. It seems however to be missing a sub-domain on colleagues in order to complete the four main social networks at the individual level (Machado, F.L., 2002, *Contrastes e Continuidades*, Oeiras, Celta Editora). For further reflection on this subject please refer to domain "Social Networks" under conditional factor "Social Cohesion". It seems important to have data not only on frequency of contact but also on quality of contact for all social networks, not only for family. On the other hand, it does not seem appropriate to include indicator 69 under sub-domain "Family Life" as it is broader than that. It would probably be a good idea to place it under a different sub-domain. Indicator 71 overlaps indicator 39 (Social Cohesion). The particular subject dealt with by these indicators seems to be more appropriately included in Social Cohesion rather than in Social Inclusion. If decided to maintain the indicator, then it would seem a good idea to widen it to friends and neighbours.

4.5.1 Neighbourhood participation

67. Proportion in regular contact with neighbours

People in Portugal seem to have more regular contacts with neighbours than EU15 average. However, the gap is not that evident, and only data regarding types of involvement (duration of contacts or support, for instance) other than simple talks (which may not be more than just circumstantial) could introduce more significant differences.

Table 58 Percentage of the population aged 16 and over talking to neighbours, 1999

	EU15	Portugal
At least once a week	81	86
Once or twice a month	10	8
Less than once a month or never	9	6

Source: « Living conditions in Europe », Eurostat, 2003, p.110

4.5.2 Friendships

68. Proportion in regular contact with friends

Table 59 Frequency of contact with friends and colleagues in Portugal and in the totality of countries surveyed by EVS

	Friends		Colleagues	
	Portugal	Total	Portugal	Total
Not at all	5.6	4.6	30.2	31.3
Few times a year	16.3	14.3	16.5	27.8
Once twice a month	14.5	27.5	17.8	22.8
Every week	63.6	53.7	35.4	18.1

Source: European Values Study, 1999.

Sociability regarding friends and colleagues seems to be stronger in Portugal than in the totality of the countries surveyed by EVS. This is true namely regarding colleagues since the proportion of Portuguese in contact with colleagues every week almost doubles the proportion for the total. (This indicator is also analysed in Social Cohesion, indicator 40).

4.5.3 Family life

69. Proportion feeling lonely / isolated

No data was found regarding this indicator.

70. Duration of contact with relatives (cohabiting and non-cohabiting)

No data was found regarding this indicator.

71. Informal (non-monetary) assistance received by different types of family

According to data from the Portuguese Time Use Survey, of 1999, 13% of the families had received informal help in the four weeks previous to the inquiry, mostly from family (proportions always higher than 75%). Neighbours were mentioned by 17%.

(This indicator is also analysed in Social Cohesion, indicator 39).

4.6 Trends and reflection

Recent years have witnessed major changes on immigration in Portugal, namely with a significant increase in the flows of population. Nowadays more than 400.000 immigrants live in Portugal, corresponding to approximately 4% of the total population, while in 1991 there were about 114.000 immigrants. In 1960 this figure was of about 20.000.

There was also a diversification of the origins of the major communities. From the revolution of 1974 onwards immigration in Portugal was strongly associated with the arrival of people from the former Portuguese colonies in Africa. The situation was only altered at the end of the 90's with the abrupt and extremely intense inflow from Eastern Europe, namely from Ukraine and from Brazil.

This increase was based almost exclusively on a permit for lingering in Portuguese territory, i.e. a reformulation of a labour visa consisting of a residence permit on a temporary basis, granted for a year with the possibility of renewals up to a maximum of five years.

In spite of an exception opened for the Brazilians, the present situation is much more restrictive. Priority shall be given to individuals covered by family reunion and nationals of countries having bilateral agreements with Portugal.

Regarding the access to vote, only in 1996 (Law 50/96) the right to vote and to be elected in local elections was granted to the citizens of countries granting the same rights to Portuguese citizens living

there (EU Countries nationals, Cape Verdians and Brazilians with a legal residence in Portugal for more than two years; Argentineans, Chelonians, Estonians, Israelis, Norwegians, Peruvians, Uruguayans and Venezuelans with a legal residence in Portugal for more than three years).

The proportion of women elected for the national parliament registered a slow progression in the last 30 years (period of democracy after the fascist regime), from 8% in 1975 to 12.5% in 1995 and 20% in 2001. In 1980, in both regional parliaments of Madeira and Azores, the proportion of women rounded 7%. However, in 2000, the parliament of Madeira had 16.3% of women while in Azores it reached only 7.7%.

In the last decades Portugal has been one of the EU countries with lower unemployment rates. In the last years, however, there has been a strong growth of unemployment rates. Till 2000 the rate has decreased (4.2%) but from that year till present it increased reaching 6.3% in 2003. This increase is likely to continue for some more time due to continuous bankruptcies, entrepreneurial re-structuring and the delocalisation of low wage based enterprises to Asia and Eastern Europe.

The unemployment rates by educational levels indicate that the highest rates are still amongst the intermediate levels, mainly for the holders of the 3rd cycle and secondary education both for all ages and for the lowest age group (15-34 years). The low level of development in Portugal, which continues to absorb less-skilled, explains the fact that unemployment rates for the population with lower levels of education, in particular those with the 1st cycle, are inferior to the overall unemployment rate, both for all ages and for the lowest age group; however, this situation will not be sustainable in the long run, due to the acceleration of the re-organisation in progress and the modernisation of the traditional sectors of the economy. Between 1998 and 2001 there was a downward tendency of the unemployment rates for all educational levels. The unemployment rate for graduates has however stabilised around 3% during the timeframe in question.

As referred on socio-economic security, from 1974 onwards there has been a strong increase on schooling levels. Nevertheless, in general terms, Portugal has rather low educational levels. In 2001 26.4% of the population had no academic qualification (it comprises illiterates and those who are not illiterate though they have not completed 4 years of schooling), 27.8% only had completed four years of schooling and 81.8% had completed, at the most, nine years of schooling (which is presently the threshold for compulsory schooling) (INE, Recenseamento Geral da População e Habitação).

Although registering a tendency for decreasing, even today about half the males and 1/3 of females leave the education system without finishing compulsory education, figures that more than double European averages.

The annual long-term unemployment rate (LTU) (equal to and more than 12 months) dropped from 2.2% in 1998 to 1.6% in 2001. The share of the LTU in total unemployment has gone down from 44.6% in 1998 to 39% in 2001. This drop has not however been evident in the long-term unemployed aged over 54 years old, whose position has indeed deteriorated between 1998 and 2001.

The concern with budget restriction and higher productivity has crosscut all areas of concern for the Government elected in 2002. The new juridical regime of hospital management is one of the examples of this new orientation. The major change introduced by the law approved in October 2002 is the “inversion in the present model of management of the hospitals that are included in the national Health Care Provision Network”. This inversion is translated into the entrepreneurial management of hospitals by private agents and changes in the labour relationship, namely by expanding individual labour contracts.

Trade unions, opposition parties, professional associations in the health area have reacted against some of these changes, which according to them will be the beginning of the end of the gratuity character of the National Health Service, a threat to the right to health consigned by the Constitution to all citizens and its change into “another kind of business”.

On the other hand, legislation is about to become operative granting the children of illegal immigrants the entitlement to primary health care.

A decade ago, Portugal almost did not have social housing. Social housing has been consistently increasing over the last years due to the re-settlement of populations living in shantytowns (Special Re-housing Programme)⁹. Between 1991 and 2001 there was a decrease in the number of huts from 16.105 to 11.540, of which the sharpest fall was registered in the Lisbon Metropolitan Area (from 11.439 to 7.112 between the decades), a territory that still concentrated in 2001 more than 30% of all these precarious dwellings; however, apart from these 11.540 (under the designation of barracas) there are also 15.779 precarious dwellings including wooden rudimentary housing, mobile dwellings, improvised dwellings and other non-defined. On these 27.000 dwellings live about 82.000 people

Regarding homelessness, new profiles of the homeless must be mentioned. Unlike some years ago, nowadays there is a strong connection between homelessness and drug addiction. Likewise the proportion of immigrants among the homeless has been consistently increasing, namely of immigrants from Eastern Europe. Due to the increase of the number of beds in shelters there is a significant number of homeless who are no longer in a situation of rough sleeping but sleeping in shelters, although they are object of almost no other intervention.

In the last decade, there was a significant growth in the pre-schooling coverage rate (children aged 3 to 5), representing, at least partially (since it includes profit private facilities) a State investment. In 1994/95, pre-schooling education was defined as a major priority by the Ministry of Education, on a context of nearly half of the children not being covered (coverage rate = 55.8%).

⁹ The aim of this Programme was to eradicate all shantytowns until 2000. However, this goal has not been attained yet and particularly in some municipalities with a strong concentration of huts in the Metropolitan Area of Lisbon, that process has gone several delays and the effects will only be seen in the following years.

However, coverage rates are still very low, namely regarding children aged less than 3 years old, in terms of childhood care, and especially in terms of the services and equipment addressed to the elderly.

The access conditions to these support services are determined by the considerable importance of private for profit facilities, both in terms of support to childhood and of support to old age. This means that the amount to pay for these services is often unbearable for a significant part of people and families.

It must be also stressed the importance of the non-profit private sector. Without this kind of civil society organisations, the poor coverage would be even more clashing. Family support maintains an enormous importance regarding this issue.

Till about a decade ago, Portugal had one of the highest savings rates in Europe. In 1990, it was 17%. This situation is now completely altered. The Portuguese savings rate decreased to 7.3% in 2000. From that year onwards there was an increase and the rate in 2002 was 9.3%.

Especially from the second half of the 90's onwards, there was a major and quick expansion of credit in Portugal. People did not have to "run after the banks" and wait several months to gain credit anymore. Now the banks were eager to get clients, offering 100% credits "just in time". This situation has, once again, changed and now there are higher difficulties to obtain credit.

The rates of goods possession increased but there is a significant number of people and families over indebted. Nevertheless, this is still a somewhat invisible phenomenon. It is known to exist but its dimension is still uncertain. As the Director of the Overindebtment Observatory puts it, most consumers pay their credits on time, mostly due to family solidarity networks.

Over the last 15-20 years the dominant trend has been the investment on roads. Railway has only been developed in some courses, namely the connection between Lisbon and Porto and suburban connections involving these two cities.

Related to what has been mentioned in the previous section, car ownership has increased significantly. It has been noted that the increase of the offer in terms of public transportation does not diminish the usage of own transportation.

Over the last years, Lisbon and Porto have witnessed an increase and the widening of cultural offer. As for the rest of the country, there was a period where a lot of theatres and cinemas closed, a trend that seems to be weaker now but not completely stopped. Now there is some of a revitalisation with the opening of private initiatives such as a new generation of bookstores promoting conferences and cultural debate in small towns.

Neighbourhood networks seem nowadays to be much less important than before. They still maintain their importance in some contexts and for some groups such as in traditional and rural neighbourhoods and for housewives. Mobility is a big issue here. The lesser the mobility the more important these networks are.

Internal migration to coastal areas and urban centres (still going) enhances the decrease of contact with relatives and the subsequent possibility of help and support. Moreover, even considering the major urban areas, the younger generations are “expelled” to the surroundings of the cities, while the older generations remain in the city. Nonetheless, family is still a major support.

5 Social Empowerment

5.1 Introduction

Elsewhere in this report (see general introduction) it was already mentioned the lack of empowerment in the Portuguese society during the fascist regime. Mainly during the revolutionary period that followed the end of the regime (1974-1975), there was a strong impulse for the empowerment of people. Many conquests regarding this dimension result from this period e.g. rise of the cooperative movement and other forms of civil society's organisations. However, some of the domains and sub-domains and, more specifically, indicators, are underdeveloped in Portugal, namely those more directly interconnected with other dimensions of social quality such as literacy and numeracy or the level of pre-and-post childcare.

In the following paragraphs, the Portuguese situation - and its comparative European stand - regarding social empowerment and its evolution is dealt with, through its domains and indicators.

5.2 Knowledge base

5.2.1 Application of knowledge

72. Extent to which social mobility is knowledge-based (formal qualifications)

No data was found regarding this indicator.

5.2.2 Availability of information

<http://nces.ed.gov/programs/digest/d02/tables/PDF/table408.pdf>

73. Per cent of population literate

According to the OECD (PISA Database), in 2000, 26.3% of the Portuguese population was in level 0 or 1 of the PISA reading competence scale. The mean prose literacy score of the Portuguese population aged 16-25 was 259.6, therefore positioned on Level 2 (varying between 226 and 275). The mean prose literacy score of the Portuguese population aged 26-65 was 209.4 - Level 1 (varying between 0 and 225).

74. Availability of free media

According to Reporters without borders, Portugal rated 8th in terms of the worldwide press freedom index, of 2002. Considering only EU15 countries, Portugal rated 4th. In 2003, it dropped to 28th and in 2004 it ranks 25th, 15th considering EU25. According to the World Economic Forum, in 2004, Portugal rates 9th regarding respect for press freedom. On the list of the North-American NGO "Freedom House", it ranked 18th.

75. Access to Internet

The number of Internet clients in Portugal increased in an abrupt way in the reference period, reaching about 35% of the Portuguese population in 2001, 97% of which with a dial-up connection. Considering just one year after the reference period, the number of clients increased substantially, reaching about half the population, along with a significant increase of wideband users.

Table 60 Number of Internet clients, by type of access (1999-2002)

	1999	2000	2001	2002
Total	645 146	2 110 828	3 459 640	5 165 083
Dial Up clients	n.d.	2 083 613	3 360 324	4 902 294
Dedicated access clients	n.d.	2 061	2 709	3 298
ADSL clients	n.a.	n.a.	2 886	52 005
Cable modem clients	297	25 154	93 721	207 486

Note: There may be some overestimation of the number of dial up clients since it is predictable that some clients use more than one ISP.

Internet through cable services started in the end of 1999. ADSL access began in the first quarter of 2001.

Source: ANACOM (National Authority for Communications).

From 1999 to 2002 Portugal moved from the last place (among EU15) in terms of Internet penetration rate to the third place, significantly above EU15 average.

Table 61 Internet penetration rate in Portugal and in the EU15

	1999	2000	2001	2002
Portugal	6.5	21.1	33.5	50.0
EU15	19.6	27.2	33.6	36.9

Source: ANACOM

Analysis in terms of yearly increase shows an amazing increase of 324% between 1999 and 2000.

Yearly increase then diminishes but always at higher records than EU15.

Table 62 Yearly increase on Internet penetration rate in Portugal and in the EU15 (base=1999)

	1999	2000	2001	2002
Portugal	--	324	59	49
EU15	--	39	24	10

Source: ANACOM

The increase between 2001 and 2002 allows seeing that, departing from similar figures (see table above) the increase in Portugal is still much higher than in EU15.

Table 63 Internet penetration rate in Portugal and in the EU15 (base=2001)

	1999	2000	2001	2002
Portugal	19	63	100	149
EU15	58	81	100	110

Source: ANACOM

5.2.3 User friendliness of information

76. Provision of information in multiple languages on social services: YES

77. Availability of free advocacy, advice and guidance centres

Private associations of several types (association of proprietors, association for consumer's rights, associations dealing with immigrants, etc.) provide free advocacy, advice and guidance services. There are also public entities providing such services on areas such as immigration, domestic violence.

There is also the possibility to obtain free legal aid, depending on income level.

If necessary, a translator will be present in court.

5.3 Labour market

5.3.1 Control over employment contract

From the Portuguese stand, the proposed indicators seem relevant for the analysis of the control over employment contract from a social empowerment perspective.

78. Percentage of labour force that is member of a trade union (differentiated to public and private employees)

Every worker is free of joining a trade union. According to the Project "Partenaires sociaux en Europe", there are more than 1 million unionised workers, representing about 18.5% of the labour force, most of which affiliated to CGTP.

Table 64 Number of unionised workers, by confederation, 2003

CGTP	652,000
UGT	400,000
Others	113,000
Total	1,165,000

Source: Partenaires sociaux en Europe project of the Institute des Sciences du Travail, Catholic University of Louvain. 'Others' refers only to the CGTP-linked (but not affiliated) Movimento Sindical Unitário (MSU), and there are likely to be some further unions. The 2003 'total' is thus likely to be incomplete.

However, these figures are not that consistent with national data. Although the number of unionised workers is usually surrounded by some secrecy, the available figures point out to a bigger discrepancy between the number of affiliates of CGTP (presumed to aggregate around 90% of all unionised workers) and UGT.

For the time being it was not possible to obtain data on the differentiation between public and private employees.

79. Percentage of labour force covered by a collective agreement (differentiated to public and private employees)

According to the “Quadros de Pessoal”¹⁰ of 1998, there were 72.243 workers under collective agreement and 1.825.279 workers under collective contract. In order to try to harmonize the data, the estimated 800.000 civil servants were subtracted to the active population in that year (5.117.000 according to INE). Using this new figure for the active population, the proportion of labour force in the private sector covered by a collective agreement is 1.7% and the proportion under collective contract is 42.3%.

Some companies try to end collective agreements, as for instance the public companies exploring the subway and buses in Lisbon and one of the major private companies operating buses in the Lisbon area (<http://jornal.publico.pt/2004/06/16/LocalLisboa/LL05.html>). This intention gave origin to a series of strikes during Euro2004.

For the time being it was not possible to obtain data on the differentiation between public and private employees.

5.3.2 Prospects of job mobility

Indicators referring to training are very important for the Portuguese context since this is one of the currently identified vulnerabilities of labour market. However, it seems questionable to place such indicators under a sub-domain named “prospects of job mobility”.

80. Percentage of employed labour force receiving work-based training

No data was found regarding employed labour force receiving work-based training. However, there is data regarding the participation of population aged 25-64 in education or training.

Table 65 Population aged 25-64 who participated in education or training in the 4 weeks previous to the inquiry

	Portugal			EU15		
	Total	Males	Females	Total	Males	Females
1999	3.4	3.2	3.6	8.2	7.9	8.6
2000	3.4	3.3	3.5	8.5	8.0	8.9
2001	3.3	3.0	3.6	8.4	7.9	9.0
2002	2.9	2.4	3.3	8.5	7.9	9.2
2003	3.6	3.4	3.9	9.7	8.9	10.4

Source: Eurostat, Labour Force Survey

It is evident that Portuguese participation rates are considerably lower than EU15 ones. Considering the reference period (1999-2001) stability is the main tone although EU15 rate reveals a slight

¹⁰ This source does not include civil servants.

increase and Portuguese rate a slight decrease, thus originating a bigger gap. In 2003, the gap is even more marked, being EU15 figures almost three times higher than Portuguese ones. Female rates are consistently higher both in Portugal and in the EU15.

81. Percentage of employed labour force availing of publicly provided training (not only skills based)

No data was found regarding employed labour force. Thus results for total labour force are presented.

Table 66 Percentage of labour force availing of publicly provided training, by type of training

	2000	2001	2002
Learning	0.52	0.50	0.53
For integration in the labour market	0.16	0.13	0.13
Educational training for poorly educated youngsters	0.01	0.03	0.04
Continuous training	0.86	0.70	0.74
Professional training for unemployed people	0.32	0.30	0.30
Educational training for adults	0.01	0.05	0.05
Socio-professional training	0.02	0.01	0
Trainer's training	0.17	0.05	0.07
Training for disadvantaged groups	0.06	0.06	0.06
EFA courses for disadvantaged groups	--	--	0.01
Other measures	0.21	0.27	0.26
Total	2.34	2.09	2.19

Source: IEFP (Centros de Gestão Directa + Centros de Gestão Participada)

82. Percentage of labour force participating in any "back to work scheme"

Till now, no data was found regarding this subject.

5.3.3 Reconciliation of work and family life (work/life balance)

83. Percentage of organisations operating work life balance policies

No data was found regarding this indicator.

84. Percentage of employed labour force actually making use of work life balance measures

According to the APDT - Associação para o Desenvolvimento do Teletrabalho, based on EFILWC, EIRO annual review 1999, around 100.000 people were teleworking, representing around 2.2% of the workforce (<http://www.eurofound.eu.int/publications/files/EF0006EN.pdf>).

No more data was found regarding other measures.

5.4 Openness and supportiveness of institutions

5.4.1 Openness and supportiveness of political system

85. Existence of processes of consultation and direct democracy (eg. referenda):

There were two referenda since 1974, one on regionalisation, the other on the decriminalisation of abortion on the first ten weeks of pregnancy.

5.4.2 Openness of economic system

86. Number of instances of public involvement in major economic decision-making (eg. public hearings about company relocation, inward investment and plant closure)

There are no such instances. What exists is reactions from local communities to decisions already taken.

5.4.3 Openness of organisations

87. Percentage of organisations/institutions with work councils

According to the results of the EPOC questionnaire of 1996, developed by the European Foundation for the Improvement of Working and Living Conditions, Portugal had the lowest proportion of workplaces with direct participation of employees (61%) against an average of 82% for the total of 10 EU15 countries reviewed.

Portugal also registered the lowest level of coverage of employee representatives. Only one third of Portuguese workplaces had representatives. Less than 10% of Portuguese workplaces had work councils.

5.5 Public space

5.5.1 Support for collective action

88. Proportion of national and local public budget that is reserved for voluntary not-for-profit citizenship initiatives

The Municipality of Lisbon, in its budget for 2004, reserves 2.3% for voluntary not-for-profit citizenship initiatives

No national data was found regarding this indicator.

89. Marches and demonstrations banned in the past 12 months as a proportion of total marches and demonstrations (held and banned)

No data was found regarding this indicator.

5.5.2 Cultural enrichment

90. Proportion of local and national budgets allocated to all cultural activities

The Municipality of Lisbon, in its budget for 2004, reserves 3.3% for cultural activities.

Table 67 Proportion of national budget allocated to cultural, recreational and religious services

2002	1.1
2003	1.2
2004	1.3

Source: Orçamento de Estado 2004

0.5% of the national budget for 2004 is attributed to the Ministry of Culture.

91. Number of self-organised cultural groups and events

It seems essential to precise what is this indicator encompassing.

92. Proportion of people experiencing different forms of personal enrichment on a regular basis

According to INE, Estatísticas da Cultura, Desporto e Recreio, 2002, there were 245 cinemas, with 504.667 performances and 19.480.000 spectators. According to INE – Anuário Estatístico, 2001, there were 13.196 live shows, with 3.835.000 spectators; 7.203 theatre performances, with 970.000 spectators; 234 museums, with 8.556.042 visitors and 556 Art galleries and other temporary exhibition spaces, with 4708 exhibitions.

5.6 Personal relationships

5.6.1 Provision of services supporting physical and social independence

93. Percentage of national and local budgets devoted to disabled people (physical and mental)

No data was found regarding this indicator.

5.6.2 Personal support services

94. Level of pre-and-post-school childcare

According to the Carta Social of 2002 (DEPP/MSST), from 1998 to 2002 the number of free time activities centres grew 28.3%. In 1998, the coverage rate of free time activities centres was 12.4%.

5.6.3 Support for social interaction

95. Extent of inclusiveness of housing and environmental design (eg. meeting places, lighting, layout)

a) Average number of meeting places, community centres, etc., per city in relation to population

b) Extent of consultation with residents by major reforms in housing and environmental design (local and national) (e.g. infrastructural projects, neighbourhood reform projects, housing projects).

No data was found regarding this indicator.

5.7 Trends and reflection

Internet penetration in Portugal increased at a remarkable speed between 1999 and 2002. However, the possibility of usage and, very importantly, the capacity for usage are very important features while analysing from an empowerment standpoint.

Migration from Eastern Europe to Portugal brought a new facet regarding the providing of information. Information regarding, for instance, health services or hygiene and safety at work started being translated, not only to Eastern Europe idioms but also to English and to “Crioulo”, the native language in Cape Verde and Guinea-Bissau, wherefrom immigrants were coming to Portugal for 30 years.

6 Social Quality Initiatives

Some of the points of this section draw heavily on reports previously developed by CESIS. Where appropriate, these reports will be mentioned in the beginning of the bullet point.

6.1 Socio-economic security

6.1.1 Rendimento Mínimo Garantido - RMG (Minimum guaranteed income) and Rendimento Social de Inserção - RSI (Insertion social income)

The minimum guaranteed income became effective in the whole country in 1997. This represented an important element for socio-economic security and social quality, as never before a benefit was granted as a right within Social Assistance. It also had important impacts on other elements of social quality. The RMG predicted not only a monetary benefit but also the fulfilment of an insertion programme, namely in the labour market, thus impacting on social inclusion.

The replacement of the minimum guaranteed income by the insertion social income (in June 2003) led to a lower coverage of the benefit. Candidates to RSI aged between 18¹¹ and 30 must now be registered at the Employment Centre of the area of residence and to demonstrate active availability for employment through their presence in the appointments determined by the Employment Centre; having fulfilled the “adequate diligences” for obtaining a job; and to communicate the Employment Centre any change of residence in 10 days at the most. Another issue regards the fact that while RMG rules for granting the benefit considered the total household income of the last three months, RSI rules considers the last twelve months, which may bias the evaluation, (reducing the possibility of the benefit being granted) although there is a weighting procedure attributing a weight of 8 to the last monthly income prior to the application; a weight of 4 to the second monthly income prior to the application; a weight of 2 to the third monthly income prior to the application; and a weight of 1 to the fourth to twelfth monthly incomes prior to the application.

6.1.2 Labour Code

This point draws heavily on Baptista, I. (2003), National report – Portugal, FEANTSA – European Observatory on Homelessness.

A Labour Code was approved in Parliament at the beginning of 2003, entering into force in December of that year. The Code has received wide opposition from all political parties of the opposition (left-wing parties) and from trade unions who have claimed for the unconstitutionality of several articles in the diploma given the restriction of several rights consigned in the Constitution. The Code – according

¹¹ This is the minimum age to accede the benefit. However, individuals younger than 18 may accede if having minors under their dependence or if it is a pregnant woman.

to the government – was drafted given “the need to increase the productivity dynamics and to allow salaries to grow”.

Following the public discussion of the Code and the negotiations undertaken, changes were introduced in the Law. However, the final version still raised some doubts concerning its unconstitutionality and the President of the Republic sent it to the Constitutional Court. Several articles were considered unconstitutional, namely those allowing “direct access of the employer to information concerning the health or the pregnancy condition of the worker or candidate to a job”, the limitations introduced to the workers’ right to strike, as well as other issues concerning collective labour contracts. The Code will once again be revised before it can be implemented.

6.1.3 The concern with budget restriction and higher productivity

This point draws heavily on Baptista, I. (2003), National report – Portugal, FEANTSA – European Observatory on Homelessness.

The concern with budget restriction and higher productivity has cross-cut all areas of concern for the present Government. Some of the major policy changes have been proposed and approved under the light of these concerns.

The new juridical regime of hospital management is one of the examples of this new orientation. The major change introduced by the law approved in October 2002 is the “inversion in the present model of management of the hospitals that are included in the national Health Care Provision Network”. This inversion is translated into the entrepreneurial management of hospitals by private agents and changes in the labour relationship, namely by expanding individual labour contracts. Once again, trade unions, opposition parties, professional associations in the health area have reacted against some of these changes, which according to them will be the beginning of the end of the gratuity and universal character of the National Health Service, a threat to the right to health consigned by the Constitution to all citizens and its change into “another kind of business”.

The “rationalisation of activities and resources” has also justified the extinction or fusion of several state services and programmes, among which we would like to refer the following:

- the extinction of the Regional Commissioners for the Fight against Poverty in May 2002 – these two Regional bodies were responsible for approving, financing and monitoring the implementation of local projects developed by different local/regional entities whose aim was to fight against poverty and social exclusion throughout the country;
- the fusion of INH - Instituto Nacional de Habitação (National Institute for Housing) and IGAPHE – Instituto para a Gestão e Alienação do Património Habitacional do Estado (Institute for the Management and Divestiture of the State’s Housing Properties) in November 2002. The major changes concern the fact that the housing management will be handed over to the municipalities and a strong emphasis has been put on the need to “develop the rental market, in particular

focussing on housing for young people and more disadvantaged population by rehabilitating existing vacant housing since it makes no sense to give priority - as until now – to the building of new houses”. INH which has been the State’s agency responsible for the promotion of social housing will now be focussing on patrimonial rehabilitation.

6.1.4 Special Re-housing Programme

This point draws heavily on Bruto da Costa, A.; Baptista, I. (2001), Access to housing: working together to prevent homelessness among disadvantaged and vulnerable groups, FEANTSA – European Observatory on Homelessness.

The Programa Especial de Realojamento – PER (Special Re-housing Programme) is probably the housing initiative which has most contributed to generalise the discussion in Portugal about the social housing policies and the social policies for housing. The debate has raised relevant questions on issues such as social justice, secular reproduction of the social housing stock, partnerships, different levels of public responsibility, integrated systems of housing management, among others.

This programme introduced mechanisms to alleviate the excessive bureaucracy and rigidity of the administrative procedures. It was thus possible to avoid the existing delays and the low levels of effectiveness in the implementation of the programme. It also encompassed “PER-families” allowing, for the first time, a direct financing to the family, with the State assuming up to 50% (non-refundable) of the costs, within the legal maximum value defined for housing acquisition within the programme. This measure gave those families with some financial possibilities the opportunity to find their own house either in the private market or in PER housing estates. In practice, finding a house within the legal limits imposed by PER was almost impossible in the private market, thus restraining the choice to the areas of Housing at Controlled Prices, which very often were PER areas.

In what concerns PER, the main political slogan was that it was meant to «end with shantytowns». Nevertheless, a study commissioned by the National Institute of Housing mentioned the following theoretical and methodological guidelines (Vieira et al., 1993): a) PER should be used as a strategic programme against discrimination and social exclusion (rather than a programme for strengthening the social ghettos that many of the existing social quarters represent; b) the need to mobilise all the available resources, both from the central administration as well as from the local authorities (soils, financing, technical means, etc.); c) the urgency of integrating the re-housing programmes into programmes of community social development that may include, simultaneously, problems related with employment, education, occupational training, health, etc.

Teixeira et al. (1997) mention three attitudes that could be identified among the local authorities, with respect to PER. For some, the programme corresponded to a need; for others, it was an opportunity; for a third group, it was an imposition. Indeed, it should be noted that the different municipalities had different experiences and sensitivities with regard to the problem. In some, shantytowns had a high

degree of visibility, the problem was recognised as a priority and various other programmes had previously been implemented. In other municipalities, the problem was less (or not at all) visible, had a rather small size and was not considered as a priority, namely when compared to other forms of housing problems. One of the issues that gained new relevance and debate concerned the roles of the central and the local authorities in the field of housing.

It should be noted that the need of undertaking a comprehensive survey of the housing problems led some of the municipalities to know, for the first time, the real dimension of the problem, which is considered, by itself, one of the positive results of the programme.

On the other hand, most of the local authorities involved adopted a multidimensional approach to the problem. As a result, the programme led to the involvement of various municipal services (namely, planning, projects and works, urban management, financial administration, housing, culture, education and social action). This not always meant that the municipalities achieved an integrated action of all the services engaged in the programme. The fact that the eradication of shantytowns was presented not only as a priority but also as an urgent achievement prevented a careful preparation of the programme and the integration of this action into a more comprehensive and coherent strategy. This lack of the necessary reflection also did not allow the programme to take the improvement in the housing conditions as an opportunity for the social promotion of the inhabitants.

Again according to Teixeira et al. (1997), not all the municipalities adopted the same overall objectives for the programme. In general, each municipality adopted one or more of the following three objectives: a) eradication of shantytowns, as a form of reducing the lack of housing; b) architectonic and urbanistic quality and urban requalification; and c) social reinsertion of the families.

6.2 Social cohesion

6.2.1 Immigration policies

Recent years witnessed changes on Portuguese immigration policies. It was established a limit of 27,000 yearly entrances in the country, as well as a set of rules complicating family reunion, and the adoption of demands of a social nature, besides demands of economic nature, for granting visas.

On the other hand, the extra-ordinary process of regularisation for illegal immigrants, that took place in 2001, allowed for the legalisation of a significant part of the illegal immigrants living in Portugal at that time, thus strongly impacting on the degree of social quality they can benefit from in Portugal.

From a socio-economic rights perspective, immigration issues have been dealt with through “universalistic policies of social integration, more than through policies aimed specifically at minorities” (Machado, 2002: 417). It is under this scope that an understanding must be made of the addition of immigrants and ethnic minorities to the disfavoured groups for whom the measures and programmes

on areas such as education and employment and training; their eligibility for the granting of the Insertion social Income; the guaranty of access to health care regardless of legal situation.

6.2.2 Support for immigrants

The consolidation of Portugal as an immigration country, and the specific immigration from Eastern Europe led to an unprecedented movement of support to immigrants, namely from civil society. Both public and private services started to make available information leaflets (e.g. on work accidents and how to prevent them) in the most represented foreign languages.

NGO's have multiplied their support services and specific programmes came into view such as Portuguese language courses¹² and a programme aiming at obtaining academic equivalences for immigrant medical doctors. This programme is expected to be widespread to nurses and engineers.

6.2.3 The impacts of the Labour Code on conciliation and gender equality

This point draws heavily on Ramalho, M.R.P.; Perista, H., *Concilier famille et travail entre les femmes et les hommes: du droit à la pratique*, December 2003.

The Labour Code includes gender issues, the assistance to maternity and paternity, and care, issues that were, till then, dispersed by different laws. However, these subjects are among those for which it was considered necessary to provide supplementary legislation to the Code, reserving the Code for the fundamental set of rules.

Generally speaking, the Code may put in danger the advances on conciliation obtained in previous laws. Contrary to European directives, the Code sets separate rules for gender equality and for maternity/paternity, establishing no connection between them.

Moreover, there is not a single mention to gender equality or maternity/paternity out of the two sections dedicated to these subjects. This seems to indicate some disregard of the subject and is contrary to the principle of mainstreaming established by article 3 n° 2 of the Treaty of the European Community

Some of the measures regarding the “protection” of maternity imply direct or indirect discrimination between men and women. Some are predicted only for women and some imply conditions that, although neutral, will probably affect differently men and women. Some are less protective than what it was consigned before.

¹² Till half a decade ago the bulk of immigrants was from Portuguese Speaking African Countries, thus Portuguese speakers in theory although, in practice, a considerable proportion of these immigrants did not had a sufficient language proficiency.

The value of the compensation for dismissal without just cause of a pregnant or lactating woman may now be lower than before.

6.3 Social inclusion

6.3.1 New legal dispositions on maternity leave

The Labour Code defines legislation regarding maternity and paternity. The maternity leave may now be used for 120 days, as before, or be extended to 150 days. This may be a good improvement on social quality. However, the 30 days extension does not provide additional payment, which may result hazardous from a socio-economic security stand.

6.3.2 Increasing the coverage of pre-schooling equipments on or after the aims of the National Action Plan for Inclusion

Objective 1.2 d) of the Portuguese National Inclusion Plan for 2003-2005 predicts the “programme of extension and development of pre-schooling education”, aiming to achieve an average coverage of 90% on the 3 to 5 age group, as stated at the *Grandes Opções do Plano* (Major Plan Options) for 2003. It also aims to guaranty, till 2006, the attendance of pre-school education to 100% of the 5 year-olds and to 75% of the 3 and 4 year-olds, building and equipping 1800 new facilities, as stated in the *Plano Nacional de Emprego* (National Action Plan for Employment).

In the schooling year of 2003/2004, three in each four children aged 3 to 5 attended a kindergarten. There was an increase of 37% regarding the number of children attending a kindergarten in 1994/1995. From the total number of children, half attended a public sector kindergarten and the other half an equipment of the private sector, which leads us to the next issue.

6.3.3 The weight of the private for profit sector on care services

Over the last years there has been an increasing importance of the private for profit sector on the providing of care services, namely crèches, residential homes for the elderly and home care support. This has obvious impacts on the possibility of access to these services. It is always possible to find a vacancy in expensive equipments but most people cannot accede these equipments, due to the predominant low income levels.

6.4 Empowerment

6.4.1 Bookstores and coffee houses

The last few years witnessed an interesting up-and-coming of bookstores in small towns located in population drive out and depressed areas. These bookstores adopting the concept of bookstore and

coffee house, allowing for people to handle books while seating on a couch having a coffee seem successful, introducing vitality into the regions, also by organising conferences, book presentations, etc, contributing for (and perhaps sometimes constituting) the cultural activity of a region.

6.4.2 The control over the employment contract

It is now under discussion a new proposal of the Government concerning temporary jobs. This project allows that the subcontracting of people through temporary job firms can be made through contracts without a defined time limit, contrary to the present law which only allows contracts for a maximum period of one year, which can be extended for another year in exceptional situations; the project also proposes to extend responsibilities concerning the hired workers to the firms that are using workers hired by temporary job firms.

The project presented for discussion concerning temporary jobs received criticisms from both employers and trade unions. The former reject the possibility of employers resorting to temporary job firms having any kind of responsibility regarding hired workers and the fact that this project does not solve what they call the labour market rigidity but only proposes some minor amendments. On the contrary, both trade union national confederations claim that the present proposal will only increase job precarity since the subcontracting of people by temporary job firms can be made through contracts which have no defined term, also allowing working contracts for a period less than six months.

7 Conclusion

From the results explicated on this report it seems clear that social quality in Portugal still has a long way ahead before it can be considered as having reached a good level. As previously mentioned throughout the report, even today Portugal is characterised by structural hindrance, reflecting a half-century of fascist totalitarian regime, that lasted till 1974, in which practically no efforts of improvement of the daily life of citizens were made and the image of the “mediocre person” was nourished.

Although the last three decades witnessed huge improvements in the Portuguese society, the effects of the half-century fascist regime linger and it still has not been possible to match European patterns.

One must not forget that thirty years ago social security, the public health system or care services were almost inexistent. In 1970, only 37.5% of births occurred in health facilities. Life expectancy was 10 years less than nowadays. Infant mortality was 37.9 per thousand (5.0 in 2002) and mother mortality rate was 73.4 per 100 thousand births (2.5 in 2000).

Education was not compulsory. Most people studied 4 years, at the most, and one in each three Portuguese was illiterate. Regarding housing conditions, in 1970, less than half of the dwelling had running water. Only 63% had electricity and only 58% had sewers.

This brief description only intends to give a look on the evolution of the last thirty years and its starting point. Such a perspective probably makes it easier to understand the present situation.

If empowerment seems the most advanced dimension, socio-economic security and social inclusion are certainly the most complicated dimensions.

Socio-economic security is still a feeble dimension. Income security is rather low. Portugal has one of the highest poverty rates in the context of the EU15 and transfers only marginally impact on these rates. Moreover, the risk of poverty increases when the individual faces illness or disability, unemployment or loneparenthood since replacement rates do not really provide security, due to poor short-term coverage, as in the case of illness, as much as due to delay of payment, in the case of unemployment.

Housing has been missing an integrated policy approach. Most measures are unconnected and poor housing conditions and even shantytowns still persist. Almost every dwelling, however, has basic amenities.

Health is another domain with clear deficits. Although the public system is universal, the actual access is complicated by huge waiting lists in the hospitals, for consultations and surgeries and by difficulties in acceding consultations in health centres. Moreover, in spite of not having reached maturity, the

Portuguese public health system is already starting to be dismantled. Means-tested payment of services is underway.

Care services are also a domain of deficit. Policies still reveal some reliance on the “welfare-society” and on “welfare-families”. In spite of its increase, coverage rates are still low and practically no support to families choosing to care for their members is granted.

Employment security reveals to be twofold. On the one hand, the formal aspects regarding length of notice seem not to be that hazardous. On the other, Portugal has higher proportions of illegal and of temporary workforce, regarding the whole EU15. Social quality seems to be less present regarding working conditions. Only two in each three mothers seem to be using maternity leave and only one in each four fathers seem to be using paternity leave. Moreover, Portugal ranks one of the highest European rates of work accidents.

Education is one of the major areas of structural hindrance. The rate of early school leavers is one of the highest in European terms thus not helping to reduce the generally low schooling levels characterising the country for several decades.

Regarding social cohesion and considering European comparative terms, some domains seem to offer higher social quality such as tolerance, trust and identity. The Portuguese seem to have more positive views on immigration and multiculturalism although one should mention the valorisation of immigrants mainly or only as workers as well as the existence of some concealed rather than explicit racism.

Other domains seem to offer less such as altruism or social contract, probably relating to the difficulty to mobilise civil society deriving from the decades of totalitarian regime. Gender equality is still far from being granted and it is certainly grievous that two in each three persons of a country registering one of the highest poverty rate in European terms considers poverty as being due to unluckiness, laziness or lack of willpower.

Indicators under the domain of social networks reveal some contradiction. On the one hand, membership rates are generally low, situation finding a root on the earlier mentioned difficult mobilisation of civil society. On the other, sociability ranks high, reflecting a “Mediterranean” way of life.

Social inclusion, highly reflecting the access dimension of socio-economic security could not convey a very different picture of social quality from that conditional factor. Health services, housing, education and social care are the most representative domains of such connection.

The possibility to accede constitutional/political rights and civil rights seems to be good. There is a real possibility of getting Portuguese citizenship as well as possibilities for foreigners (EU citizens and non-

EU citizens) to participate in local elections. Abstention is, however, a problem since it has been growing throughout the years. Believing in data, discrimination does not seem to be frequent but, as previously mentioned, concealed racism exists. Ethnic minorities almost do not accede higher levels of the political or economic spheres. Besides, some population groups face difficulties in daily life, such as the disabled, and in the labour market sphere as, for instance, pregnant women or older workers.

Although the Portuguese long-term unemployment rate is lower than the EU15 rate, this is a complicated problem mainly for workers aged 45 and more and for women. Involuntary temporary and involuntary part-time employment are issues where the Portuguese situation does not seem to convey social quality.

Regarding the indicators where gender is addressed more directly it is possible to see that the situation of women is, generally speaking, less favourable than that of men. Access to higher levels of the political and economic spheres are still more difficult and the gender pay gap is still significant.

The right to a public pension offers a mixed picture. The system is universal or almost but it operates in a context of low amounts. Pensioners are one of the most vulnerable groups to poverty and deprivation.

Transportation is perceived as a domain where huge improvements can be made. In many cases, public transportation is not considered as a real alternative to private transportation due to differences in travel time and punctuality, and the packed-out situation people have to face in buses or trains. Thus, traffic jams are common, mainly in the major urban areas and one of the main roads linking the suburbs of Lisbon to the city is the most jam-packed road in Europe.

Social networks, on the other hand, convey a very positive picture, both regarding family and friends, as well as regarding neighbours and colleagues, the four main social networks at the individual level, reflecting the above-mentioned Southern-Mediterranean characteristics.

Comparatively speaking, and based on chosen indicators, social empowerment is perhaps, along with social cohesion, the conditional factor ranking higher in Portugal. This is not surprising since this is possibly the factor less dependent on the structural hindrance characterising Portugal. The provision of services such as Internet or information in multiple languages seems easier to manage than structural improvements in health or housing. There is some degree of control over the employment contract, still deriving from strong emphasis in human capital fostered by the period after the revolution of 1974.

On the other hand, there is not much openness of institutions. There is not a tradition of consultation and direct democracy, of public involvement in economic decision-making or employee participation. Literacy and training are areas where there is a clear deficit. Literacy levels are among the lowest in Europe and only a small proportion of workers engage in training and long-life learning. Work-family

life balance is not a priority for most organisations and thus this remains a difficult issue, mainly for women.

There are also negative signs coming, for instance, from media. In 2002, Portugal rated 8th in terms of press freedom, but in 2004 it dropped to 25th. Moreover, recent cases show severe pressures from the Government in order to control not only public media but also private media, pressing them to control negative comments and criticism to the Government.

Different signals may be drawn out of the analysis of policy initiatives impacting on social quality, deriving a great deal from the change from a Centre-Left Government to a Right-wing Government occurred in April 2002. On the one hand, some initiatives impact (or intend to impact) positively in social quality but, on the other, initiatives are taken that reduce social quality. This is the case even regarding the same measure/set of measures.

For instance in the case of the RMG (1997-2003) and its successor RSI, the first represented a strong input regarding socio-economic security and although with its replacement by RSI that input is not lost, it introduced a narrower coverage. Moreover, this narrowing was based upon a higher involvement of beneficiaries focussing on activation policies and the need to overcome subsidy dependence, thus impacting on other dimensions of social quality.

Being a comprehensive approach, Social Quality obviously has to deal with such paradoxes. Social life is not a clear-cut matter and as a result, paradoxes, overlaps, back and forth movements have to be carefully but decidedly analysed and integrated in social thinking. Because the improvement of the daily life of citizens is, utterly and ultimately, the focus of this chosen path.

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Annex Social Quality indicators

Indicators of Socio-economic Security

Domains	Sub-domains	Indicators		
Financial resources	Income sufficiency	1. Part of household income spent on health, clothing, food and housing (in the lower and median household incomes)		
	Income security	2. How do certain biographical events affect the risk of poverty on household level. 3. Proportion of total population living in households receiving entitlement transfers (means-tested, cash and in-kind transfers) that allow them to live above EU poverty level		
	Housing and environment	Housing security	4. Proportion of people who have certainty of keeping their home 5. Proportion of hidden families (i.e. several families within the same household)	
Housing conditions		6. Number of square meters per household member 7. Proportion of population living in houses with lack of functioning basic amenities (water, sanitation and energy)		
Environmental conditions (social and natural)		8. People affected by criminal offences per 10.000 inhabitants 9. Proportion living in households that are situated in neighbourhoods with above average pollution rate (water, air and noise)		
Health and care	Security of health provisions	10. Proportion of people covered by compulsory/ voluntary health insurance (including qualitative exploration of what is and what is not covered by insurance system)		
	Health services	11. Number of medical doctors per 10.000 inhabitants 12. Average distance to hospital, measure in minutes, not in meters 13. Average response time of medical ambulance		
	Care services	14. Average number of hours spent on care differentiated by paid and unpaid		
	Work	Employment security	15. Length of notice before employer can change terms and conditions of labour relation/contract 16. Length of notice before termination of labour contract 17. proportion employed workforce with temporary, non permanent, job contract 18. Proportion of workforce that is illegal	
Working conditions		19. Number of employees that reduced work time because of interruption (parental leave, medical assistance of relative, palliative leave) as a proportion of the employees who are entitled to these kinds of work time reductions 20. Number of accidents (fatal / non-fatal) at work per 100.000 employed persons (if possible: per sector) 21. Number of hours a full-time employee typically works a week (actual working week)		
		Education	Security of education	22. Proportion of pupils leaving education without finishing compulsory education (early school leavers) 23. Study fees as proportion of national mean net wage
			Quality of education	24. Proportion of students who, within a year of leaving school with or without certificate, are able to find employment

Source: M. Keizer and L.J.G. van der Maesen: Social Quality and the Component of Socio-economic security 3rd Draft, Working Paper, Amsterdam, September 2003

Indicators of Social Cohesion

Domains	Sub-domains	Indicators
Trust	Generalised trust	25. Extent to which 'most people can be trusted'
	Specific trust	26. Trust in: government; elected representatives; political parties; armed forces; legal system; the media; trade unions, police; religious institutions; civil service; economic transactions
		27. Number of cases being referred to European Court of law
		28. Importance of: family; friends; leisure; politics; respecting parents. parents' duty to children
Other integrative norms and values	Altruism	29. Volunteering: number of hours per week
	Tolerance	30. Blood donation
		31. Views on immigration, pluralism and multiculturalism
	Social contract	32. Tolerance of other people's self-identity, beliefs, behaviour and lifestyle preferences
		33. Beliefs on causes of poverty: individual or structural
		34. Willingness to pay more taxes if you were sure that it would improve the situation of the poor
		35. Intergenerational: willingness to pay 1% more taxes in order to improve the situation of elderly people in your country
Social networks	Networks	36. Willingness to actually do something practical for the people in your community/ neighbourhood, like: picking up litter, doing some shopping for elderly/ disabled/ sick people in your neighbourhood, assisting neighbours/ community members with filling out (fax/ municipal/ etc) forms, cleaning the street/ porch/ doorway
		37. Division of household tasks between men and women: Do you have an understanding with your husband/ spouse about the division of household tasks, raising of the children, and gaining household income?
		38. Membership (active or inactive) of political, voluntary, charitable organisations or sport clubs
		39. Support received from family, neighbours and friends
		40. Frequency of contact with friends and colleagues
Identity	National/ European identity	41. Sense of national pride
	Regional/ community/ local identity	42. Identification with national symbols and European symbols
		43. Sense of regional / community / local identity
	Interpersonal identity	44. Sense of belonging to family and kinship network

Source: Y. Berman and D. Phillips: Indicators for Social Cohesion, 5th Draft, EFSQ Working Paper, Amsterdam, June 2004

Indicators of Social Inclusion

Domains	Sub-domains	Indicators	
Citizenship rights	Constitutional/ political rights	45. Proportion of residents with citizenship	
		46. Proportion having right to vote in local elections and proportion exercising it	
	Social rights	47. Proportion with right to a public pension (i.e. a pension organised or regulated by the government)	
		48. Women's pay as a proportion of men's	
	Civil rights	49. Proportion with right to free legal advice	
		50. Proportion experiencing discrimination	
	Economic and political networks	51. Proportion of ethnic minority groups elected or appointed to parliament, boards of private companies and foundations	
		52. Proportion of women elected or appointed to parliament, boards of private companies and foundations	
	Labour market	Access to paid employment	53. Long-term unemployment (12+ months)
			54. Involuntary part-time or temporary employment
Services	Health services	55. Proportions with entitlement to and using public primary health care	
		Housing	56. Proportion homeless, sleeping rough
			57. Average waiting time for social housing
	Education	58. school participation rates and higher education participation rates	
		Social care	59. Proportion of people in need receiving care services
			60. Average waiting time for care services (including child care)
	Financial services	61. Proportion denied credit differentiated by income groups	
		62. Access to financial assistance / advice in case of need	
	Transport		63. Proportion of population who has access to public transport system
			64. Density of public transport system and road density
Civic / cultural services		65. Number of public sport facilities per 10.000 inhabitants	
		66. Number of public and private civic & cultural facilities (e.g. cinema, theatre, concerts) per 10.000 inhabitants	
Social networks	Neighbourhood participation	67. Proportion in regular contact with neighbours	
	Friendships	68. Proportion in regular contact with friends	
	Family life	69. Proportion feeling lonely/isolated	
		70. Duration of contact with relatives (cohabiting and non-cohabiting)	
	71. Informal (non-monetary) assistance received by different types of family		

Source: A. Walker and A. Wigfield: The Social Inclusion Component Of Social Quality, EFSQ Working Paper, Amsterdam, September 2003

Indicators of Social Empowerment

Domains	Sub-domains	Indicators
Knowledge base	Application of knowledge	72. Extent to which social mobility is knowledge-based (formal qualifications)
		73. Per cent of population literate and numerate
	Availability of information	74. Availability of free media
		75. Access to internet
		76. Provision of information in multiple languages on social services
Labour market	User friendliness of information	77. Availability of free advocacy, advice and guidance centres
		78. % Of labour force that is member of a trade union (differentiated to public and private employees)
	Control over employment contract	79. % Of labour force covered by a collective agreement (differentiated by public and private employees)
		80. % Of employed labour force receiving work based training
	Prospects of job mobility	81. % Of labour force availing of publicly provided training (not only skills based). (Please outline costs of such training if any)
Openness and supportiveness of institutions	Reconciliation of work and family life (work/ life balance)	82. % Of labour force participating in any "back to work scheme"
		83. % Of organisations operating work life balance policies.
	Openness and supportiveness of political system	84. % Of employed labour force actually making use of work/life balance measures (see indicator above)
		85. Existence of processes of consultation and direct democracy (eg. referenda)
		86. Number of instances of public involvement in major economic decision making (e.g. public hearings about company relocation, inward investment and plant closure)
Public space	Openness of economic system	87. % of organisations/ institutions with work councils
		88. % Of the national & local public budget that is reserved for voluntary, not-for-profit citizenship initiatives
	Support for collective action	89. Marches and demonstrations banned in the past 12 months as proportion of total marched and demonstrations (held and banned).
		90. Proportion of local and national budget allocated to all cultural activities
		91. Number of self-organised cultural groups and events
Personal relationships	Cultural enrichment	92. Proportion of people experiencing different forms of personal enrichment on a regular basis
		93. percentage of national and local budgets devoted to disabled people (physical and mental)
	Provision of services supporting physical and social independence	94. Level of pre-and-post-school child care
		95. Extent of inclusiveness of housing and environmental design (e.g. meeting places, lighting, layout)

Source: P. Herrmann: Discussion Paper on the Domain Empowerment, 3rd Draft, ENIQ October 2003

Annex Collective data

1. Socio-economic security

Domain: Financial resources

Sub-domain: Income security

3. Proportion of total population living in households receiving entitlement transfers (means-tested, cash and in-kind transfers) that allow them to live above EU poverty level.

At-risk-of-poverty rate before and after social transfers: total

The share of persons with an equivalised disposable income below the risk-of-poverty threshold, which is set at 60% of the national median equivalised disposable income

	1997		1998		1999		2000		2001	
	before	after	before	after	before	after	before	after	before	after
EU 15	25	16	24	15	24	15	23	15	24	15
EU 25	:	:	:	:	24	15	:	:	24	15
Belgium	26	14	25	14	24	13	23	13	23	13
Germany	22	12	22	11	21	11	20	10	21	11
Greece	23	21	22	21	22	21	22	20	23	20
Spain	27	20	25	18	23	19	22	18	23	19
France	26	15	25	15	24	15	24	16	24	15
Ireland	32	19	32	19	30	19	31	20	30	21
Italy	22	19	21	18	21	18	21	18	22	19
Hungary	:	:	:	:	:	:	19	9	20	10
Netherlands	23	10	21	10	21	11	21	10	21	11
Portugal	27	22	27	21	27	21	27	21	24	20
Slovenia	17	11	17	12	18	11	17	11	:	:
Finland	23	8	22	9	21	11	19	11	19	11
Sweden	28	9	28	10	28	9	27	11	27	10
UK	30	18	30	19	30	19	29	19	29	17

Source: Eurostat; free data, social cohesion

At-risk-of-poverty rate before and after social transfers: males and females

The share of persons with an equivalised disposable income below the risk-of-poverty threshold, which is set at 60% of the national median equivalised disposable income

	1999		2000				2001					
	males		females		males		females		males		females	
	before	after	before	after	before	after	before	after	before	after	before	after
EU 15	23	15	25	16	22	14	24	16	22	14	25	16
EU 25	23	15	25	16	:	:	:	:	23	14	25	17
Belgium	23	11	26	14	22	12	25	14	21	12	25	15
Germany	20	10	21	12	19	10	22	11	20	10	23	12
Greece	22	20	23	21	22	19	23	20	21	19	24	22
Spain	23	18	23	19	21	17	23	19	22	17	25	20
France	24	15	25	16	24	15	25	16	23	15	24	16
Ireland	28	17	32	20	29	19	33	21	29	20	32	23
Italy	20	18	21	18	20	18	21	19	21	19	23	20
Hungary	:	:	:	:	18	9	19	10	20	10	21	10
Netherlands	21	10	22	11	21	11	21	10	21	12	21	11
Portugal	27	19	28	22	26	19	28	22	25	20	24	20
Slovenia	17	11	19	12	17	10	18	12	:	:	:	:
Finland	19	9	22	12	18	9	21	13	17	9	20	14
Sweden	26	9	29	10	26	10	28	11	25	10	29	11
UK	27	18	32	21	26	16	32	21	26	15	32	19

Source: Eurostat; free data, social cohesion

Domain: Housing and environment

Sub-domain: Housing conditions

7. Proportion of population living in houses with *lack* of functioning basic amenities (water, sanitation and energy)

Percentage of household lacking at least one of the three basic amenities by income group, 1999

	EU	B	D	EL	E	F	IRL	I	NL	P	FIN	S	UK
All households	21	19	10	38	62	11	16	15	12	89	4	-	11
Household income less than 60% compared to median actual current income	35	33	25	70	84	24	33	40	16	96	9	-	16

Source: Eurostat 2003, Living conditions in Europe

Domain: Health and care

Sub-Domain: Health services

11. Number of medical doctors per 100.000 inhabitants

Number of practitioners per 100 000 inhabitants

	EU15	B	D	EL	E	F	IRL	I	NL	P	FIN	S	UK
1997	-	386	345	410	428	325	214	578	-	306	296	278	168
1998	368	395	350	426	436	426	219	583	295	312	300	278	172
1999	375	405	355	438	444	328	227	589	311	318	306	283	176
2000	-	411	359	-	454	329	250	599	321	325	308	-	180
2001	-	419	362	-	-	-	-	-	-	-	-	-	-

Source: Eurostat, Yearbook 2003

12. Average distance to hospital, measure in minutes, not in meters

Proximity to hospitals by income (% having access to a hospital in less than 20 minutes by quartiles of household-equivalence income)

	Total	Lowest quartile	Highest quartile	Difference in percentage points
EU 15	52,8	44,9	60,4	15,5
Belgium	66	53,6	78,9	25,3
Germany	52,7	48	56,8	8,9
Greece	39,9	35,7	44,3	8,5
Spain	41,4	38,4	44,2	5,8
France	54,4	43,4	65,3	21,9
Ireland	44,6	40,5	48,7	8,2
Italy	60,9	47	75,2	28,2
Hungary	31,4	16	46,8	30,8
Netherlands	72,5	66,8	77,8	11
Portugal	37,8	27,2	49	21,9
Slovenia	37,9	30,5	46,2	15,7
Finland	50,9	48	53,8	5,8
Sweden	58	56	60	4,0
UK	45,5	34,2	57,8	23,6

Source: Eurobarometer 52.1

Domain: Work

Sub-domain: Employment security

17. Proportion employed workforce with temporary, non permanent, job contract

Proportion employees with a contract of limited duration (temporary job contracts)

	1999			2000			2001			2002		
	total	females	males	total	females	males	total	females	males	total	females	males
EU 15	13,2	14,2	12,4	13,4	14,5	12,5	13,4	14,5	:	13,1	14,3	12,1
Belgium	10,3	13,7	7,7	9	12,1	6,6	8,8	12,1	:	7,6	10,3	5,5
Germany	13,1	13,4	12,8	12,7	13,1	12,5	12,4	12,7	:	12	12,2	11,8
Greece	13	14,7	12	13,1	15,7	11,5	12,9	15,4	:	11,3	13,4	9,8
Spain	32,7	34,9	31,4	32,1	34,6	12,1	31,6	34,1	:	31,2	34,2	29,2
France	14	14,8	13,3	15	15,7	14,3	14,9	16,3	:	14,1	16	12,5
Ireland	9,4	12,1	7,1	4,6	5,8	3,6	3,7	4,5	:	5,3	6,3	4,5
Italy	9,8	11,8	8,5	10,1	12,2	8,8	9,5	11,5	:	9,9	12,1	8,3
Hungary	:	:	:	:	:	:	7,5	6,8	:	7,4	6,8	8
Netherlands	12	15,4	9,4	14	17,2	11,1	14,3	17,5	:	14,3	17	12,2
Portugal	18,6	20,4	17,1	20,4	22,7	18,4	20,3	22,1	:	21,8	23,4	20,5
Slovenia	:	:	:	:	:	:	13,1	13,3	:	14,7	16,7	12,9
Finland	18,2	21,2	15,2	17,7	20,9	14,5	17,9	22	:	17,3	20,5	13,9
Sweden	13,9	16,6	11,2	14,7	16,9	12,1	14,7	16,9	:	15,7	17,9	13,3
UK	6,8	7,5	6,2	6,7	7,7	5,7	6,7	7,5	:	6,1	6,8	5,5

Source: Eurostat; Statistics in Focus

Sub-domain: Working conditions

20. Number of fatal accidents (fatal / non-fatal) at work per 100.000 employed persons (if possible: per sector)

Incidence rate of accidents at work. Incidence = (number of accidents at work that occurred during the year/number of persons in employment in the reference population) x100000

	1994		1998	
	non-fatal	fatal	non-fatal	fatal
EU 15	4539	3,9	4089	3,4
Belgium	4415	6	5112	3,1
Germany	5583	3,7	4958	3
Greece	3702	4,3	2936	3,7
Spain	6166	7	7073	5,5
France	5515	4,3	4920	4
Ireland	1494	3,9	1433	5,9
Italy	4641	5,3	4105	5
Hungary	:	:	:	:
Netherlands	4287	:	3909	:
Portugal	7361	8,4	5505	7,7
Slovenia	:	:	:	:
Finland	3914	3,6	3435	2,4
Sweden	1123	2,1	1329	1,3
UK	1915	1,7	1512	1,6

Source: Eurostat; Statistics in Focus

Evolution of the accidents at work, 1998 = 100

	1997		1998		1999		2000		2001	
	serious	fatal	serious	fatal	serious	fatal	serious	fatal	serious	fatal
EU 15	100	100	100	100	100	85	98	82	94 (p)	79 (p)
Belgium	96	100	100	100	96	106	82 (b)	100	83	124
Germany	101	90	100	100	99	80	96	70	88	65
Greece	113	76	100	100	93	170	88	73	86	78
Spain	95	115	100	100	107	91	108	85	106	81
France	101	103	100	100	101	85	102	85	98	79
Ireland	115	120	100	100	90	119	72	39	105	43
Italy	100	84	100	100	99	68	99	66	92	62
Hungary	103	97	100	100	93	107	94	95	86	71
Netherlands	107	140	100	100	108 (b)	107	105	106	92	79
Portugal	100	108	100	100	92	79	88	104	:	:
Slovenia	106	130	100	100	102	88	98	83	94	105
Finland	98	117	100	100	91	75	89	88	87 (b)	8 (b)
Sweden	81	169	100	100	107	85	111	85	113	105
UK	102	100	100	100	106	88	106	106	110	92

p) provisional value

b) break in series

Source: Eurostat, free data, employment

Fatal work accidents (per 100 000 employed persons), 2000

	EU	B	D	EL	E	F	IRL	I	NL	P	FIN	S	UK
Total	5	5	4	3	7	6	2	7	2	9	2	2	2
Age group under 25	3	7	3	1	5	4	-	7	1	5	1	3	1
Age group 45 and over	7	6	5	5	10	10	-	10	4	16	3	3	3

Source: Eurostat 2003; Living conditions in Europe

21. Number of hours a full-time employee typically works a week (actual working week)

Hours worked per week of full time employment

	1996	1997	1998	1999	2000	2001	2002	2003
EU 15	42.1	42.1	42.1	41.9	41.7	41.6	41.4	:
Belgium	40.3	40.6	41.2	38.4	38.5	41.2	41.4	41.3
Germany	41.6	41.7	41.7	41.8	41.8	41.6	41.4	41.0
Greece	44.6	44.4	44.5	44.7	44.2	44.2	44.2	44.4
Spain	42.2	42.3	42.3	42.2	42.1	42.0	41.8	41.6
France	41.2	41.1	41.0	40.9	40.2	39.6	38.9	40.7
Ireland	43.9	43.2	42.9	42.1	41.9	41.5	41.2	41.0
Italy	40.6	40.5	40.6	40.5	40.6	40.6	40.5	40.5
Hungary	42.1	42.0	41.8	42.0	41.9	41.5	41.4	41.4
Netherlands	41.5	41.3	41.0	41.0	41.0	40.9	40.7	40.6
Portugal	43.7	43.1	43.1	42.4	42.0	41.9	41.9	41.6
Slovenia	43.6	43.8	43.9	43.6	43.1	43.2	43.1	42.6
Finland	40.5	40.9	40.9	41.0	40.9	40.7	40.6	40.6
Sweden	41.4	41.4	41.3	41.3	41.2	41.0	41.0	40.8
UK	44.8	44.9	44.8	44.4	44.2	44.2	43.9	43.8

Source: Eurostat; free data, long term indicators, people in the labour market

Domain: Education

Sub-domain: Security of education

22. Proportion of pupils leaving education without finishing compulsory education (early school leavers)

Early school-leavers - total - Percentage of the population aged 18-24 with at most lower secondary education and not in further education or training

	1999	2000	2001	2002	2003
EU 25	:	:	17.2 (p)	16.5 (p)	15.9 (b)
EU 15	20.5 (p)	19.4 (p)	18.9 (p)	18.5 (p)	18.0 (b)
Belgium	15.2 (b)	12.5	13.6	12.4	12.8
Germany	14.9	14.9	12.5	12.6	12.6 (p)
Greece	17.8	17.1	16.5	16.1	15.3 (b)
Spain	29.5	28.8	28.6	29.0	29.8
France	14.7	13.3	13.5	13.4	13.3 (b)
Ireland	:	:	:	14.7	12.1 (b)
Italy	27.2	25.3	26.4	24.3	23.5
Hungary	13.0	13.8	12.9	12.2	11.8 (b)
Netherlands	16.2	15.5	15.3	15.0	15.0 (p)
Portugal	44.8	42.9	44.3	45.5	41.1
Slovenia	:	:	7.5	4.8 u	4.3
Finland	9.9	8.9 (b)	10.3	9.9	10.7 (b)
Sweden	6.9	7.7	10.5 (b)	10.4	9.0 (b)
UK	19.7 (p)	18.3 (p)	17.6 (p)	17.7 (p)	16.7 (p)

p) provisional value

b) break in series

Source: Eurostat SC053 IV.5.1

Early school-leavers - males and females - Percentage of the population aged 18-24 with at most lower secondary education and not in further education or training

	1999		2000		2001		2002		2003	
	females	males	females	males	females	males	females	males	females	males
EU 25	:	:	:	:	15.0(p)	19.5(p)	14.2(p)	18.7(p)	13.9(b)	17.9(b)
EU 15	18.4(p)	22.6(p)	17.1(p)	21.6(p)	16.6(p)	21.2(p)	16.1(p)	20.9(p)	15.9(b)	20.2(b)
Belgium	12.7(b)	17.7 b	10.2	14.8	12.3	15.0	9.9	14.9	10.8	14.7
Germany	15.6	14.2	15.2	14.6	12.8	12.2	12.6	12.6	12.6(p)	12.6(p)
Greece	14.8	21.2	12.9	21.8	13.0	20.4	12.3	20.1	11.0 (b)	19.6(b)
Spain	23.6	35.4	23.2	34.3	22.2	34.9	22.3	35.4	23.4	36.1
France	13.4	16.0	11.9	14.8	12.0	15.0	11.9	14.9	11.6 (b)	15.0(b)
Ireland	:	:	:	:	:	:	10.8	18.5	9.2(b)	14.9(b)
Italy	24.2	30.3	21.9	28.8	22.6	30.2	20.7	27.9	20.1	26.8
Hungary	12.7	13.3	13.2	14.3	12.6	13.3	11.8	12.5	11.1(b)	12.4(b)
Netherlands	14.9	17.5	14.8	16.2	14.1	16.5	14.3	15.7	14.3 p)	15.7(p)
Portugal	38.8	50.7	35.4	50.3	37.0	51.6	38.1	52.9	33.8	48.3
Slovenia	:	:	:	:	5.6	9.3	3.3	6.2	2.3	6.2
Finland	7.9	12.0	6.5(b)	11.3(b)	7.7	13.0	7.3	12.6	8.6(b)	12.9(b)
Sweden	6.1	7.7	6.2	9.2	9.7 b	11.3 b	9.3	11.4	8.2(b)	9.8(b)
UK	19.3(p)	20.1(p)	17.8(p)	18.8(p)	16.6(p)	18.6(p)	16.6(p)	18.8(p)	16.4(p)	17.0(p)

p) provisional value

b) break in series

Source: Eurostat SC053 IV.5.1-2

2. Social cohesion

Domain: Trust

Sub-domain: Generalised trust

25. Extent to which 'most people can be trusted'

Proportion of the population who thinks that most people can be trusted

	B	D	EL	E	F	IRL	I	HU	NL	SL	FIN	S	UK
most people can be trusted	29,3	34,8	19,1	38,5	22,2	35,2	32,6	21,8	59,7	21,7	58	66,3	29,9
you cannot be too careful	70,7	65,2	80,9	61,5	77,8	64,8	67,4	78,2	40,3	78,3	42	33,7	70,1

Source: European Values Study; A third Wave (question 8)

Extent to which the population thinks that most people can be trusted, 2002

The table includes the country means in a 0-10 scale, where 0 means the distrust and 10 means the trustfulness

	B	D	EL	E	IRL	I	HU	NL	P	SL	FIN	S	UK
country means	4,81	4,61	3,64	4,86	5,46	4,54	4,08	5,71	4	3,98	6,46	6,09	5,05

Source: European Social Survey (ESS) 2002

Sub-domain: Specific trust

26. Trust in: government; elected representatives; political parties; armed forces; legal system; the media; trade unions, police; religious institutions; civil service; economic transactions

Trust in different institutions in European countries 2002/2003

	Trust in country's parliament	Legal system	Police	Politicians	European Parliament
Belgium	4,99	4,39	5,64	4,28	4,88
Germany	4,47	5,73	6,73	3,5	4,46
Spain	4,83	4,31	5,43	3,37	4,8
Finland	5,79	6,75	7,95	4,78	4,88
UK	4,68	5,03	6,04	3,79	3,61
Greece	4,83	6,27	6,43	3,46	5,69
Hungary	5	5,11	4,91	3,88	5,67
Ireland	4,43	5,14	6,53	3,75	5,11
Italy	4,83	5,49	6,66	3,54	5,51
Netherlands	5,22	5,38	5,82	4,87	4,67
Portugal	4,44	4,26	5,13	2,82	4,76
Sweden	5,92	6,06	6,76	4,72	4,02
Slovenia	4,04	4,28	4,89	3,07	4,65

Source: European Social Survey 2002.

Remarks: The table includes the country means in a 0-10 scale, where 0 means the distrust and 10 means the trustfulness.

28. Importance of: family; friends; leisure; politics; respecting parents. parents' duty to children

Proportion of the population for whom work, family, friends, leisure time, politics is quite or very important in its life (those two answer categories are taken together)

	work	family	friends	leisure time	politics	religion
Belgium	92,8	97,6	89,1	86,2	33,1	47,6
Germany	82,7	96,9	94,5	83,2	39,5	35
Greece	87,2	99,1	85,5	76,9	34,9	79,7
Spain	94,6	98,9	86,6	80,9	19,3	42
France	94,8	98,2	94,4	88,1	35,4	36,9
Ireland	84,7	98,5	97,3	86,9	32,1	70,7
Italy	95	98,6	89,8	81,2	33,8	72,1
Hungary	88,7	97,8	82,3	79,7	18,2	42,3
Netherlands	86,5	92,7	96,3	94	57,7	39,8
Portugal	95,1	98,7	87,9	83,7	27,1	75,5
Slovenia	95,8	97,2	88,3	79,7	14,5	36,6
Finland	89,2	96,2	95,2	90	19,8	45,1
Sweden	91,1	97,9	97,6	93,9	55	35
UK	78,6	98,8	96,6	92,5	34,3	37,4

Source: European Values Study; A third Wave (question 1)

Domain: Other integrative norms and values

Sub-domain: Altruism

29. Volunteering: number of hours per week

Volunteer work and informal help among persons aged 20-74 (Hours and minutes per day)

	B	D	F	HU	SI	FIN	S	UK
Volunteer work and help among women aged 20-74	0:10	0:15	0:14	0:08	0:06	0:16	0:12	0:14
Volunteer work and help among men aged 20-74	0:11	0:17	0:18	0:13	0:11	0:16	0:12	0:10

Source: How Europeans spend their time everyday life of women and men – Luxembourg

30. Blood donation

Blood donation (%), 2002

	EU	B	D	E	F	IRL	I	NL	P	FIN	S	UK
Yes	31	23	31	25	38	32	24	26	22	39	25	32

Source: « Le don de sang », Eurostat, 2003, p.2, Eurobarometer 58.2

Sub-domain: Tolerance

31. Views on immigration, pluralism and multiculturalism

Proportion of different opinions according to the inclusion of immigrants in different countries, 2000

Country	Let anyone come who wants to	Let people come as long as there jobs available	Put strict limits on the number of foreigners who can come here	Prohibit people coming here from other countries
Belgium	7,4	33,5	50,5	8,6
Germany	4,5	32,6	56	7
Greece	3,5	40,9	41	14,6
Spain	19,1	56,2	22,4	2,3
Ireland	8,3	46,7	42,1	2,9
Italy	9,7	47,4	38,3	4,6
Hungary	2	12	59,1	26,8
Netherlands	3,9	35,9	55,6	4,7
Portugal	11,5	61,4	23,2	3,9
Slovenia	4,6	48,1	38,9	8,4
Finland	10,4	34,7	51,9	3
Sweden	16,3	54,4	28,7	0,5
UK	4,3	34,1	48,5	13,1

Source: European Values Survey 1999/2000, Q74

Proportion of different opinions in connection with the cultural identity of immigrants in different countries

Country	For the greater good of society it is better if immigrants maintain their distinct customs and traditions	For the greater good of society it is better if immigrants do not maintain their distinct custom and traditions but take over the customs of the country
Belgium	28,1	71,9
Germany	23,8	76,2
Greece	68,7	31,3
Spain	52	48
Ireland	56,7	43,3
Italy	59,7	40,3
Hungary	33,4	66,6
Netherlands	29,1	70,9
Portugal	48,9	51,1
Slovenia	30,8	69,2
Finland	32	68
Sweden	36	64
UK	44,7	55,3

Source: European Values Survey 1999/2000, Q75

32. Tolerance of other people's self-identity, beliefs, behaviour and lifestyle preferences

Typology of people according to their attitudes towards minorities

Proportion of the population that is intolerant, ambivalent, passively tolerant and actively tolerant by country

	Intolerant	Ambivalent	Passively tolerant	Actively tolerant
EU15	14	25	39	21
Belgium	25	28	26	22
Germany	18	29	29	24
Greece	27	43	22	7
Spain	4	18	61	16
France	19	26	31	25
Ireland	13	21	50	15
Italy	11	21	54	15
Netherlands	11	25	34	31
Portugal	9	34	44	12
Finland	8	21	39	32
Sweden	9	15	43	33
UK	15	27	36	22

Source: Eurobarometer 2000 survey

Tolerance of other people's self-identity, beliefs, behaviour and lifestyle preferences

	B	D	EL	E	F	IRL	I	HU
Claiming state benefits which you are not entitled to	2,57	1,91	3,64	2,67	3,39	1,9	1,88	1,7
Cheating on tax if you have the chance	3,64	2,36	2,88	2,35	3,06	2,35	2,39	2,12
Taking and driving away a car belonging to someone else (joyriding)	1,2	1,24	1,39	1,64	1,38	1,11	1,46	1,14
Taking the drug marihuana or hashish	1,72	1,91	2,04	2,16	2,15	1,99	2,03	1,26
Lying in your own interest	3,62	3,32	2,58	2,93	3,71	2,32	2,41	2,53
Married men/women having an affair	2,72	2,85	2,12	2,48	3,52	1,84	2,75	2,1
Someone accepting a bribe in the course of their duties	2	1,8	1,66	1,68	2,08	1,42	1,5	2,67
Homosexuality	5,22	5,69	3,39	5,51	5,27	4,4	4,83	1,45
Abortion	4,45	4,61	4,18	4,34	5,64	2,9	4,04	3,92
Divorce	5,64	5,86	5,42	6,1	6,32	4,8	5,14	4,5
Euthanasia (terminating the life of the incurably sick)	5,83	4,34	3,49	4,73	6,16	3,31	3,86	3,83
Suicide	3,27	2,61	2,26	2,77	4,34	2,07	2,28	1,56
Throwing away litter in a public place	1,48	2,22	1,88	1,86	1,62	1,81	1,58	1,72
Driving under the influence of alcohol	1,64	1,45	1,49	1,52	1,88	1,4	1,43	1,16
Paying cash for services to avoid taxes	4,29	2,89	3,46	3,35	4,18	2,89	2,5	2,62
Having casual sex	2,86	3,15	3,6	3,92	3,91	2,71	3,07	2,74
Smoking in public buildings	2,92	4,05	4	3,74	3,38	3,33	3,46	2,85
Speeding over the limit in built-up areas	2,39	1,99	2,19	1,93	2,84	1,85	2,61	1,98
Avoiding a fare on public transport	2,39	2,13	2,89	:	2,71	:	2,17	:
Sex under the legal age of consent	:	2,64	4,57	:	:	1,45	:	:
Prostitution	:	4,19	2,37	3,25	:	2,54	2,4	:
Political assassinations	:	1,49	1,93	:	:	:	:	:
Scientific experiments on human embryos	2,07	1,52	1,38	1,74	:	1,92	1,95	:
Genetic manipulation of food stuff	2,42	2,21	2,32	2,05	:	:	2,31	:

Tolerance of other people's self-identity, beliefs, behaviour and lifestyle preferences (continued)

	NL	P	SL	FIN	S	UK	Total
Claiming state benefits which you are not entitled to	1,51	2,03	2,82	2,3	2,08	1,99	2,28
Cheating on tax if you have the chance	2,67	2,45	2,34	2,46	2,41	2,42	2,63
Taking and driving away a car belonging to someone else (joyriding)	1,34	1,62	1,68	1,31	1,29	1,21	1,41
Taking the drug marihuana or hashish	3,06	2,02	2,3	1,65	1,77	3,1	1,83
Lying in your own interest	3,14	2,45	2,54	2,71	2,56	3,01	2,85
Married men/women having an affair	2,69	2,47	3,47	2,36	2,38	2,31	2,56
Someone accepting a bribe in the course of their duties	1,58	1,77	1,78	1,43	1,83	1,77	1,82
Homosexuality	7,8	3,19	4,62	4,94	7,65	4,89	4,3
Abortion	5,4	3,81	6,19	5,42	7,38	4,54	4,58
Divorce	6,54	5,46	6,58	6,64	7,8	5,57	5,51
Euthanasia (terminating the life of the incurably sick)	6,65	3,5	5,37	5,4	6,07	4,99	4,82
Suicide	4,34	2,2	3,54	3,04	4,12	3,16	2,63
Throwing away litter in a public place	1,7	1,83	1,94	2,27	2,72	2,61	1,88
Driving under the influence of alcohol	1,44	1,83	2,04	1,35	1,35	1,51	1,54
Paying cash for services to avoid taxes	4,2	2,25	3,28	3,48	3,78	3,53	3,25
Having casual sex	3,7	2,76	4,08	3,75	4,8	3,44	3,15
Smoking in public buildings	3,81	3,34	3,57	3,1	3,18	4,02	3,51
Speeding over the limit in built-up areas	1,8	2,38	2,93	2,82	2,72	2,3	2,33
Avoiding a fare on public transport	2,72	:	:	2,36	:	2,68	2,82
Sex under the legal age of consent	:	:	5,78	3,31	:	1,96	2,53
Prostitution	:	:	3,31	3,2	:	3,42	2,84
Political assassinations	:	:	:	1,44	:	1,99	1,63
Scientific experiments on human embryos	2,5	:	1,86	2,47	:	2,35	2,08
Genetic manipulation of food stuff	3,07	:	2,83	2,6	:	2,3	2,42

Source: European Values Survey 1999/2000, Q65, 1-10 scale

Sub-domain: Social contract

33. Beliefs on causes of poverty: individual or structural

Proportion of the population which considers (respectively) unfortunateness, laziness, injustice and the modern progress as the most important reason for living in need

	unlucky	laziness or lack of willpower	injustice in society	part of the modern progress	none of these
Belgium	26,8	16	35,3	20	1,9
Germany	11,7	28,4	36,9	19,6	3,5
Greece	14,3	29,8	18,2	34,4	3,3
Spain	19,8	19,6	48,4	10,4	1,9
France	14,4	11,4	44,3	26,9	2,9
Ireland	23,2	20,6	33	19,3	3,9
Italy	19,5	23	37,7	15,6	4,2
Hungary	13	27,6	37,7	18,8	2,9
Netherlands	32,8	14,3	25,8	17,5	9,7
Portugal	23,3	41,9	21,6	11,6	1,6
Slovenia	10,4	33,2	35,4	17,3	3,7
Finland	14,8	23	23,8	35,3	3,1
Sweden	10,2	7,1	49,5	33,1	0
Great Britain	16,4	24,6	30,5	24,4	4,1

Source: European Values Study : A third Wave (question 11)

38. Membership (active or inactive) of political, voluntary, charitable organisations or sport clubs

Proportion of people member of non-governmental organizations (NGO's) in different countries, 2002/2003

	B	D	EL	E	IRL	I	HU	NL	P	SL	FIN	S	UK
Male	65,1	72	24,8	36,7	68,6	37	27,9	84,4	31,1	51,3	64,6	82,8	71,4
Female	57,1	61,7	16,4	29,5	59,3	24,9	17,7	77,4	18,6	33,3	57,2	78,8	62

Source: European Social Survey 2002/2003

Proportion of population which belongs to....

	B	D	EL	E	F	IRL	I
social welfare services for elderly, handicapped or deprived people	11,4	3,9	10,2	3,7	5,6	5,9	6,4
religious or church organisations	12,2	13,5	11,8	5,8	4,3	16,2	10,3
education, arts, music or cultural activities	18,9	7,9	11,2	7,3	7,8	10,1	9,9
trade unions	15,7	7,2	6,5	3,5	4	10	6,2
political parties or groups	7	2,8	4,9	2	2	4,4	4,1
local community action on issues like poverty, employment, housing, racial equality	5	0,7	2,8	2,2	2,3	5,6	2,4
third world development or human rights	9,8	0,6	1,8	2,4	1,4	2,4	2,9
conservation, the environment, ecology, animal rights	10,4	2,7	5,8	2,5	2,2	2,8	3,8
professional associations	8,3	4,4	7,7	2,6	3,1	7,7	7,1
youth work	7,5	1,9	2,5	2,6	2	7,1	4,2
sports or recreation	23,8	28	9,6	8,5	16,4	27,6	11,5
women's groups	8,7	3,6	2,2	2,3	0,4	4,4	0,4
peace movements	2,3	0,2	2,9	1,6	0,5	1,7	1,4
voluntary organisations concerned with health	5	2,5	3,6	2,7	2,5	4,1	4,7
other groups	10,6	3,9	6,8	3,7	6,9	5,4	2,6

Proportion of population which belongs to.... (continued)

	HU	NL	P	SL	FIN	S	UK
social welfare services for elderly, handicapped or deprived people	1,9	21,6	2	5,4	10,4	20,8	6,7
religious or church organisations	12,1	35,1	5,6	6,7	47	71,5	4,9
education, arts, music or cultural activities	3,4	46,2	3,1	9,2	14,3	26,4	9,7
trade unions	7	23,4	1,7	16,9	32,3	64	8,2
political parties or groups	1,6	9,5	0,9	3	6,6	10,6	2,5
local community action on issues like poverty, employment, housing, racial equality	1	7,4	1	9,2	2,6	9,5	3,8
third world development or human rights	0,3	24,6	0,8	0,8	5,9	15	2,6
conservation, the environment, ecology, animal rights	1,7	44,3	0,5	3,3	4,4	11,3	1,5
professional associations	3,7	18,5	1,1	6,7	5,6	14,5	1,6
youth work	0,8	7,3	1,2	4,5	6,7	6,9	5,7
sports or recreation	3,8	50,3	8,6	16,9	23,7	37	3
women's groups	0,3	4		1,9	4	3,5	1,7
peace movements	0,3	3,4	0,6	0,8	1,3	1,5	0,6
voluntary organisations concerned with health	2	9,6	2,2	2,9	9,2	6,7	3
other groups	2,6	9,7	3,2	9,9	11,8	25	5

Source: European Values Study; A third Wave (question 5)

40. Frequency of contact with friends and colleagues

Frequency of spending time with friends

	B	D	EL	E	F	IRL	I	HU	NL	P	SL	FIN	S	UK
every week	50,2	49,3	62,1	67,5	58,5	72,1	61,9	37,0	66,7	63,6	57,7	60,3	66,5	74,2
once a week	30,9	36,7	23,6	18,5	28,0	21,1	20,2	29,1	25,5	14,5	25,7	27,7	28,2	18,5
few times a year	14,1	12,3	11,3	10,1	11,0	5,3	13,3	22,0	6,5	16,3	14,0	11,0	5,0	5,2
not at all	4,9	1,7	3,1	3,9	2,5	1,6	4,6	11,9	1,3	5,6	2,6	1,0	0,3	2,1

Source: European Social Survey (Q6A)

Frequency of spending time with colleagues

	B	D	EL	E	F	IRL	I	HU	NL	P	SL	FIN	S	UK
every week	12,9	11,3	24,1	27,0	12,5	25,0	16,8	13,6	14,7	35,4	24,4	23,3	17,8	18,6
once a week	22,5	27,0	23,3	18,7	18,7	27,5	21,9	17,3	29,2	17,8	25,6	23,8	35,9	24,2
few times a year	33,4	39,9	21,6	18,8	24,0	20,4	26,4	20,5	38,3	16,5	28,2	33,8	37,0	26,8
not at all	31,2	21,8	30,9	35,4	44,7	27,0	35,0	48,5	17,7	30,2	21,9	19,1	9,3	30,3

Source: European Social Survey (Q6B)

Domain: Identity

Sub-domain: National / European pride

41. Sense of national pride

Sense of pride : proportion of the population which is proud of being (country) / European

	EU15	B	D	EL	E	F	IRL	I	NL	P	FIN	S	UK
national pride	85	83	66	96	92	86	96	93	84	92	96	90	90
european pride	61	64	49	64	74	58	75	81	62	66	73	70	47

Source: Standard Eurobarometer 6;: full report (categories very and fairly proud taken together)

Sense of national pride

	B	D	EL	E	F	IRL	I	HU	NL	P	SL	FIN	S	UK
very proud	24,3	16,8	65	44,1	39,7	71,8	39,3	50,9	19,5	79,1	55,7	56,1	41,4	50,5
quite proud	50,9	50,8	25,6	45,2	49,6	26,2	49	38,4	60,5	17,7	34,9	37,5	45,6	39,5
not very proud	17,5	24,3	8,6	7,8	7	1,7	9,8	8,5	14,8	2,3	7,4	5,6	11,6	7,9
not at all proud	7,3	8,1	0,9	3	3,7	0,3	1,9	2,3	5,2	0,9	2	0,9	1,4	2,1

Source: European Values Study; A third Wave (Q71)

Sub-domain: Regional / community / local identity

43. Sense of regional / community / local identity

Which of these geographical groups would you say you belong to first of all?

	B	D	EL	E	F	IRL	I	HU	NL	P	SL	FIN	S	UK
locality or town	32,1	55,2	44,8	45,6	43,7	56,6	53,4	67,3	39,1	36,3	52,8	48,9	58,7	48,9
region of country	20,3	29,6	12	16,5	12,1	15,8	10,6	6,3	7,7	16	8,7	12,3	9,5	13,7
country as a whole	27,9	10,1	33,2	26,8	28,5	24	23,3	20,1	41,2	41,6	32,1	31,2	22,4	28,4
Europe	9,3	2,9	1,2	1,7	4,3	2,2	4,2	2	4,8	1,6	2,4	3,2	4,2	1,9
world as a whole	10,4	2,2	8,8	9,4	11,4	1,4	8,5	4,3	7,2	4,5	3,9	4,4	5,3	7,2

Source: European Values Study; A third Wave (Q67)

3. Social inclusion

Domain: Citizenship rights

Sub-domain: Constitutional / political rights

46. Proportion having right to vote in local elections and proportion exercising it

Proportion voting in national elections (as the percentage of the voting age population)

	B	D	EL	EL	F	IRL	I	HU	NL	P	SL	FIN	SL	UK
1995-1999	83,2	:	83,9	80,6	59,9	66,7	87,4	:	:	79,1	:	71,1	:	69,4

Source: IDEA (1997), Voter Turnout from 1947 to 1997 and OECD : Society at a glance 2001

Sub-domain: Social rights

48. Women's pay as a proportion of men's

Gender pay gap

as the difference between average gross hourly earnings of male paid employees and of female paid employees as a percentage of average gross hourly earnings of male paid employees.

	1997	1998	1999	2000	2001
EU (15 countries)	16	16	15	16	16
Belgium	10	9	11	12	12
Germany	21	22	19	21	21
Greece	13	12	13	15	18
Spain	14	16	14	15	17
France	12	12	12	13	14
Ireland	19	20	22	19	17
Italy	7	7	8	6	6
Hungary	22	18	19	20	19
Netherlands	22	21	21	21	19
Portugal	7	6	5	8	10
Slovenia	14	11	14	12	11
Finland	18	19	19	17	17
Sweden	17	18	17	18	18
United Kingdom	21	24	22	21	21

Source: Eurostat; free data, employment

Earnings of men and women

Annual gross earnings of women as a percentage of men's, 2000

	EU15	B	D	EL	E	F	IRL	I	NL	P	FIN	S	UK
Industry and services	75	83	-	80	77	82	-	-	73	71	79	86	68
Industry	77	83	78	83	73	84	-	-	77	67	82	89	69
Mining and quarrying	75	99	91	81	-	92	-	-	-	94	77	90	68
Manufacturing	75	79	76	74	-	79	-	-	75	65	80	89	68
Electricity, gas and water supply	78	68	82	81	-	83	-	-	81	89	77	83	70
Construction	88	99	91	94	102	100	-	-	82	90	82	90	76
Trade and repairs	72	79	74	76	-	77	-	-	68	71	73	83	63
Hotels and restaurants	79	91	-	77	-	85	-	-	82	74	90	90	72
Transport	84	91	-	64	-	90	-	-	74	98	87	92	81
Financial intermediation	62	70	75	73	-	64	-	-	62	80	57	66	46
Real estate	70	76	-	91	-	72	-	-	70	71	75	78	66

Note: The share refers to full-time earnings.

Source: «Living conditions in Europe», Eurostat, 2003, p.60

Sub-domain: Economic and political networks

52. Proportion of women elected or appointed to parliament, boards of private companies and foundations

Proportion of women in national governments and parliaments, 2001

	B	D	EL	ES	F	IRL	I	NL	P	FIN	S	UK	Total
government	22,2	38,6	12,5	17,6	29,4	21,9	10,3	36	9,8	38,9	50	32,9	24,7
parliament	24,6	29,8	8,7	27,1	8,3	14,2	10,2	32,4	20	37	44,3	17	20,5

Source: Europäische datanbank Frauen in Führungspositionen (www.db-decision.de)

Domain: Labour market

Sub-domain: Access to paid employment

53. Long-term unemployment (12+ months)

Total long-term unemployment

	1997	1998	1999	2000	2001	2002	2003
EU 15	4.9	4.4	4.0	3.5	3.1	3.1	3.3
Belgium	5.4	5.5	4.9	3.7	3.2	3.5	3.7
Germany	4.9	4.7	4.3	3.9	3.8	4.1	4.6
Greece	5.3	5.8	6.4	6.0	5.4	5.1	5.1
Spain	8.9	7.6	5.9	4.7	3.9	3.9	3.9
France	4.8	4.6	4.2	3.6	3.0	3.0	3.4
Ireland	6.0	3.9	2.6	1.6	1.2	1.3	1.5
Italy	7.5	7.0	6.8	6.4	5.8	5.3	4.9
Hungary	4.5	4.2	3.3	3.0	2.5	2.4	2.4
Netherlands	2.3	1.5	1.2	0.8	0.7	0.7	1.0
Portugal	3.3	2.2	1.8	1.7	1.5	1.8	2.2
Slovenia	3.4	3.3	3.2	4.1	3.5	3.4	3.4
Finland	4.9	4.1	3.0	2.8	2.5	2.3	2.3
Sweden	3.1	2.6	1.9	1.4	1.0	1.0	1.0
UK	2.5	1.9	1.7	1.5	1.3	1.1	1.1

Source: Eurostat; free data, social cohesion

Long-term unemployment: females and males (1997-2000)

	1997		1998		1999		2000	
	females	males	females	males	females	males	females	males
EU 15	5.8	4.2	5.4	3.7	4.7	3.3	4.2	2.9
Belgium	7.1	4.2	7.0	4.5	5.9	4.1	4.6	3.0
Germany	5.6	4.3	5.3	4.2	4.7	4.0	4.2	3.7
Greece	9.3	2.8	9.9	3.1	10.5	3.7	9.8	3.5
Spain	14.1	5.7	12.4	4.8	9.4	3.7	7.6	2.8
France	5.7	4.0	5.5	3.9	5.1	3.5	4.4	2.9
Ireland	5.1	6.5	2.8	4.6	1.9	3.2	1.0	2.0
Italy	10.5	5.7	9.5	5.4	9.3	5.2	8.8	4.9
Hungary	4.0	4.9	3.9	4.5	2.9	3.6	2.5	3.4
Netherlands	3.1	1.8	1.8	1.3	1.5	0.9	1.0	0.6
Portugal	3.6	3.0	2.7	1.9	2.1	1.5	2.1	1.4
Slovenia	3.3	3.6	3.3	3.3	3.0	3.4	4.1	4.0
Finland	4.9	4.9	4.0	4.3	2.8	3.2	2.7	2.8
Sweden	2.0	4.0	1.8	3.2	1.4	2.2	1.0	1.7
UK	1.5	3.3	1.2	2.5	1.0	2.2	0.9	1.9

Long-term unemployment: females and males (continued) (2001-2003)

	2001		2002		2003	
	females	males	females	males	females	males
EU 15	3.7	2.7	3.6	2.7	3.7	2.9
Belgium	3.6	3.0	4.1	3.2	4.0	3.4
Germany	4.1	3.7	4.2	4.0	4.6	4.6
Greece	8.6	3.1	8.3	3.0	8.5	2.8
Spain	6.3	2.3	6.3	2.3	6.0	2.4
France	3.7	2.4	3.5	2.6	3.9	3.1
Ireland	0.8	1.6	0.7	1.7	0.9	1.9
Italy	8.0	4.5	7.2	4.1	6.7	3.9
Hungary	2.1	2.9	2.1	2.7	2.3	2.5
Netherlands	0.8	0.5	0.8	0.6	1.1	1.0
Portugal	1.9	1.2	2.2	1.4	2.6	1.8
Slovenia	3.6	3.4	3.4	3.4	3.6	3.3
Finland	2.3	2.7	2.0	2.5	2.0	2.6
Sweden	0.8	1.2	0.8	1.2	0.8	1.2
UK	0.8	1.7	0.7	1.4	0.7	1.4

Source: Eurostat; free data, social cohesion

Domain: Social networks

Sub-domain: Neighbourhood participation

67. Proportion in regular contact with neighbours

Percentage of population aged 16 and over talking to neighbours, 1999

	EU	B	D	EL	E	F	IRL	I	NL	P	FIN	S	UK
At least once a week	81	71	-	96	90	-	89	80	70	86	79	-	78
Once or twice a month	10	17	-	2	5	-	7	10	14	8	12	-	13
Less than once a month or never	9	12	-	2	5	-	4	10	16	6	9	-	9

Source: Eurostat 2003, Living conditions in Europe

Sub-domain: Friendships

68. Proportion in regular contact with friends

Percentage of the population aged 16 and over meeting people (at home or elsewhere), 1999

	EU	B	D	EL	E	F	IRL	I	NL	P	FIN	S	UK
At least once a week	81	78	-	90	92	66	97	81	85	74	80	-	87
Once or twice a week	14	18	-	9	6	26	3	13	13	16	17	-	10
Less than once a month or never	5	4	-	2	2	8	1	6	2	9	4	-	3

Source: Eurostat 2003, Living conditions in Europe

4. Social Empowerment

Domain: Knowledge base

Sub-domain: Availability of information

73. Per cent of population literate and numerate

Competence poverty: proportion of educationally „poor” individuals in different countries based on literacy competences

	B	D	EL	F	IRL	I	HU	P	FIN	S	UK
students aged 15	19	22,6	24,4	15,2	11	18,9	22,7	26,3	6,9	12,6	12,8
Population aged 16-65	15,3	9	-	-	25,3	-	32,9	49,1	12,6	6,2	23,3

Source: PISA2000; Adult Literacy Survey, 1994-98

75. Access to internet

Internet use in different European countries (% of individuals aged 14 and over)

	B	EL	E	IRL	I	HU	NL	P	SL	FIN	S	UK
Never use	56,3	86,6	75,1	58,3	69,8	80,4	40,7	69,9	64,1	43,9	33	51,4
Everyday use	18,1	4,2	9,3	13	9,9	5,7	21,7	14,8	10,6	18,8	27,8	17,7

Source: European Social Survey, 2002/2003

Domain: Labour market

Sub-domain: Prospects of job mobility

80. % of employed labour force receiving work based training

Continuing vocational training (CVT) in enterprises (1999)

	EU	B	D	EL	E	F	IRL	I	NL	P	FIN	S	UK
Training enterprises as a % of all enterprises	62	70	75	18	36	76	79	24	88	22	82	91	87
Employees in training enterprises as a % of employees in all enterprises	88	88	92	56	64	93	92	56	96	52	95	98	97
Participants in CVT courses as a % of employees in all enterprises	40	41	32	15	25	46	41	26	41	17	50	61	49
Hours in CVT courses per employee (all enterprises)	12	13	9	6	11	17	17	8	15	7	18	18	13
Hours in CVT courses per participant	31	31	27	39	42	36	40	32	37	38	36	31	26

Source: Eurostat 2003, Living conditions in Europe

Distribution of companies and enterprises that provide vocational training, 1999 (%)

Branch	B	D	E	HU	NL	P	SL	FIN	S
Industry	68	73	38	34	90	19	53	77	90
Commerce	72	83	41	39	87	24	30	85	94
Finanacial services	100	100	74	79	97	67	66	100	100
Economic services	86	87	41	48	90	43	60	86	90
Other public and personal services	75	89	33	35	88	29	69	93	100
Other	63	65	29	31	86	18	46	79	84

Source: Eurostat 2002, Statistics in Focus

Annex Social Quality theory

1 Introduction

In the 1990s representatives of universities from different European countries started to elaborate the theory of social quality. Stimulated by neo-liberal globalisation and the dominance of economic interests and herewith related economic thinking and policies in the process of European integration, they were searching for an alternative. Important was to develop international standards with which to counteract the downward pressure on welfare spending (the race to the bottom). But which standards were acceptable, which theoretical criteria could be applied and why? The social quality initiative addressed these questions and could be seen as a possible theoretical foundation upon which judgements for acceptable standards could be made. The initiative was launched formally under the Dutch Presidency of the European Union in 1997. The European Foundation on Social Quality, localised in Amsterdam was founded and presented its first study; *The Social Quality of Europe* (Kluwer Law International, 1997; paperback version by Policy Press, 1998). Social quality is a new standard intended to assess economic, cultural, and welfare progress. One that can be used at all levels to measure the extent to which the daily lives of citizens have attained an acceptable level. It aspires to be both a standard by which people can assess the effectiveness of national and European policies and a scientific yardstick for evidence-based policy making. Its ambition is to contribute to public policies that improve the democratic relations on European and national levels and that enhance social justice and equity in the cities and regions of Europe.

From the beginning the theory's aims has been to contribute to a comprehensive understanding of societal processes and to develop an interdisciplinary approach. The social quality approach is a strategy for analysing the reciprocity between societal structures and actions of citizens. The most renewing aspect of this approach – and especially in this respect social quality differs from the traditional (passive) welfare policies – is the addition of the concept of empowerment; a concept that strengthens the roles of citizens in their communities. The goal is to contribute to the personnel development of citizens to enable them to elaborate their own conditions for social quality in daily circumstances.

The first study delivered the points of departure for the Amsterdam Declaration of Social Quality (June 1997) which opens with the words; *“Respect for the fundamental human dignity of all citizens requires us to declare that we do not want to see growing numbers of beggars, tramps and homeless in the cities of Europe. Nor can we countenance a Europe with large numbers of unemployed, growing numbers of poor people and those who have only limited access to health care and social services. These and many other negative indicators demonstrate the current inadequacy of Europe to provide social quality for all citizens”*. This Declaration was finally signed by thousands scientists all over Europe and presented solemnly to the President of the European Parliament in October 1997.

In this appendix to the national reports about the indicators of social quality we will not present the whole theory, but only the aspects relevant for the application of this theory and for the analysis of societal trends and processes in the European Union. The project, for which these national reports

are made, tries to determine and compare the nature of social quality in the different European countries.

2 The European Network on Indicators of Social Quality (ENIQ)

2.1 The Foundation's second book as point of departure

The policy of the European Foundation on Social Quality is based on five pillars: (i) theorising social quality, (ii) developing its measurement instruments, (iii) applying these instruments to policy outcomes as well as circumstances in cities and regions, (iv) disseminating the Foundation's outcomes, and (v) stimulating public debates. In January 2001 the Foundation published the outcomes of the 'permanent symposium' about social quality and the outcomes of its projects in a second book; *Social Quality, A New Vision for Europe* (Kluwer Law International, 2001). In the Foreword of this book Mr. R. Prodi, the former President of the European Commission, says that "*The concept of quality is, in essence, a democratic concept, based on partnership between the European institutions, the Member States, regional and local authorities and civil society. Quality conveys the sense of excellence that characterises the European social model. The great merit of this book is that it places social issues at the very core of the concept of quality. It promotes an approach that goes beyond production, economic growth, employment and social protection and gives self-fulfilment for individual citizens a major role to play in the formation of collective identities. This makes the book an important and original contribution for the shaping of a new Europe*".

Thanks to this work the Foundation was rewarded for a manifold of grants. The most important were, first, a grant by DG Employment and Social Affairs for analysing employment policies from a social quality perspective. The main theme concerned the way the social quality approach may underpin flexibility and security in employment. The outcomes were published by Berghahn Journals in the double issue of the European Journal of Social Quality in 2003. The second important grant was rewarded by DG Research to develop a robust set of indicators with which to measure the conditional factors of social quality. This resulted in the start of the European Network on Indicators of Social Quality in October 2001. Representatives of fourteen universities in Europe and of two European NGOs participated in this network (see page iv of the national report). They were funded to appoint part-time junior scientists as assistants.

2.2 The challenge of the Network Indicators

The network had to deal with a couple of challenges. Within the network people, firstly, used different interpretations of the social quality theory. Secondly, they used different research methodologies. Thirdly, they had different cultural backgrounds (including different scientific backgrounds; like economics, political science, sociology, social policy), and fourthly, they had to deal with the language problem for proper communication. Therefore one of the major objectives of this network was to develop a common understanding. This goal was reached by a combination of deductive and inductive analysis in different stages of the project. In the first stage a preliminary consensus about the theory – discussed during plenary sessions - was tentatively applied in the fourteen national contexts. It concerned the first assessment of data availability in national and European databases for one conditional factor of social quality. The outcomes stimulated to deepen the common understanding and relationship between the four different conditional factors of social quality. The next stage was used for a second tentative application, now for all factors. The outcomes of the second exploration of data availability paved the way for the elaboration of the commonly accepted interpretation of the conditional factors (see below).

Especially thanks to the input by the network, the co-ordinating team and its advisors could specify and clarify the theory by defining the essence of the four conditional factors from a new interpretation of 'the social'. This was done also by analysing the general scientific and European policy debates about the concepts. The outcomes of this theoretical work paved the way for the third (and last) exploration of data availability in the fourteen countries, resulting in the national reports about indicators of social quality. In other words, the work by the network stimulated an incessant reciprocity between empirical exploration and theoretical work. The outcomes of this theoretical work and the interpretation of the outcomes of the national reports will be published in the Foundation's third study, forthcoming at the end of 2005.

3 Some aspects of the theory and its indicators

In this section a short overview will be given of the theoretical research of the project. This theoretical background is essential to understand the choice of the indicators for social quality on which the empirical research of the national reports is based.

3.1 The reciprocity between structure and action

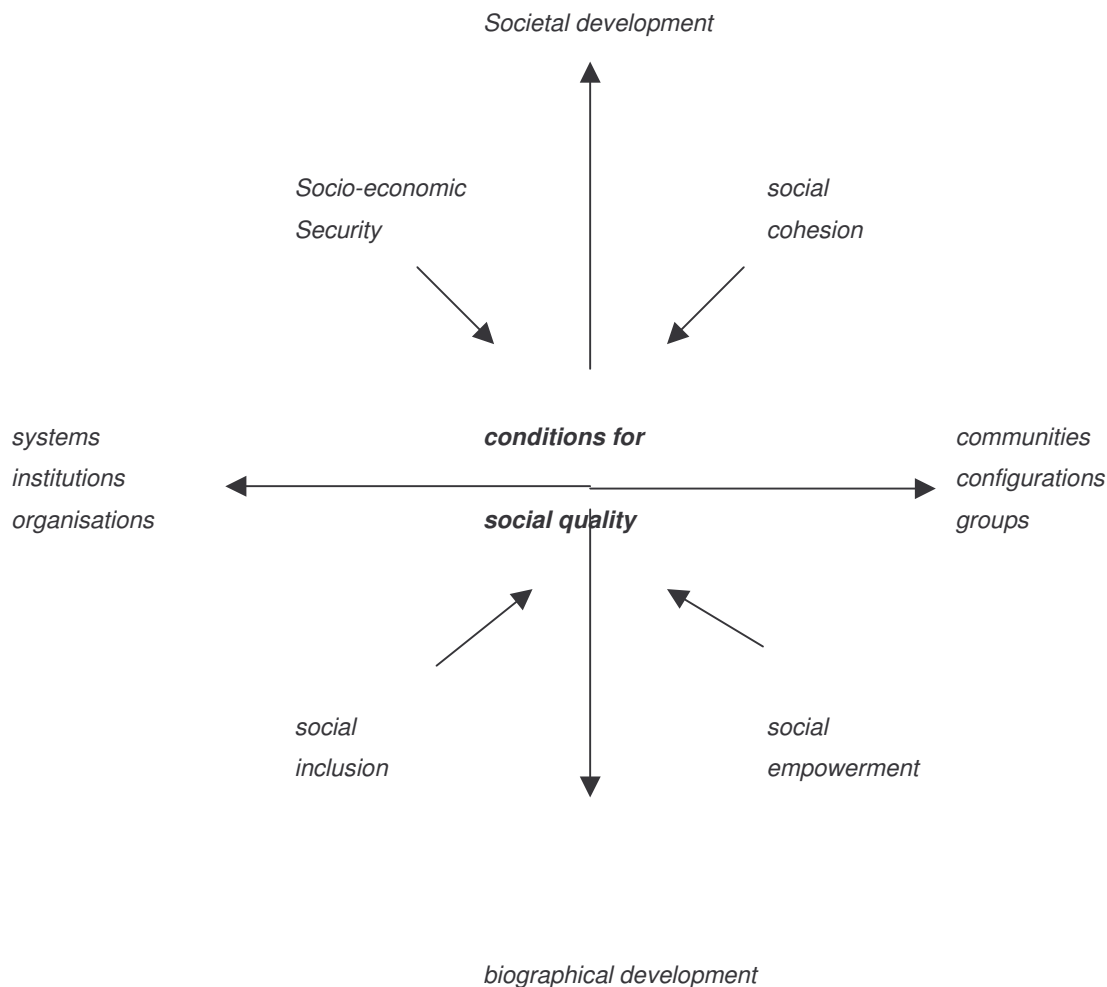
A fundamental problem of any comprehensive theoretical approach is to grasp the structural and dialectical interdependence of what Emile Durkheim called 'social facts'. The reason for mentioning Durkheim here is that in his definition of 'social facts' he explicitly showed the supposed independence of 'the social'. We should however remark that 'the social' can only accurately be understood by reference to the individual as actor. The actual problem can be seen in the fact that we are challenged to think the seemingly impossible – the simultaneity of independence and dependence. Furthermore, we have to accentuate the position of individual people as social actors in order to realise the goal of social quality, namely understanding the reciprocity between social structures and actions of citizens.

The social quality approach tries to resolve the actual tension behind action and structure in a dialectical way. Social science is by definition a theory of action (this is not the same as the so-called 'action theory'), as the social cannot be imagined without actions or interventions by individual people. Instead of leaving this to spontaneous and voluntarist assessments it is proposed to search for criteria that allow the analysis of the developmental interconnectedness of both, the biographical and societal momentum of interaction; (i) amongst individual people, (ii) between individual people and society, (iii) amongst societal subsystems and not least (iv) between the various social actors and the natural environment. The social quality approach can serve as a comprehensive or meta-theory for addressing this interconnectedness. Rather than referring to actors and structure, this approach refers on the one hand to biographical and on the other hand to societal development. At the very same time, another reference is made to systems on the one hand and communities on the other hand.

3.2 The four conditional factors

Starting point of developing such a perspective is to look at a common denominator, i.e. criteria which are necessary for their constitution. This is not achieved by looking for minimal standards. Rather, the idea is that there should be a strong commonality in terms of the recognition of all four angles of the social fabric. This is meant to be a substantial dimension of the relationship between action and structure. We recognise four conditional factors of social quality, namely: (i) socio-economic security, (ii) social cohesion, (iii) social inclusion, and (iv) social empowerment. These four conditional factors define the concrete qualitative frame, in which society, individuals and their interaction develop.

Figure-1 The quadrangle of the conditional factors



This frame refers to the institutional level and the space for direct interaction. Furthermore it refers to the development of the actual interaction and the behavioural framework for this interaction. Each of these conditional factors has a different meaning, specific for what could be called 'elements of the social', i.e. for societal processes, biographical processes, systems and institutions, and communities and configurations. However, at the same time all of them are – individually and by their interaction – crucial as conditional factors.

3.3 A referral to the four constitutional factors

As important as this is, it is necessary to go a step further. Namely, to be able to go further into detail of analysing the actual interaction between people, we have to look as well for constitutional factors that realise the individual's competence to act. These factors are derived from the first basic assumption of the theory of social quality. It says, that individual people are essentially social beings.

They interact with each other and these interactions constitute the collective identities as contexts for their actions, resulting in processes of self-realisation.

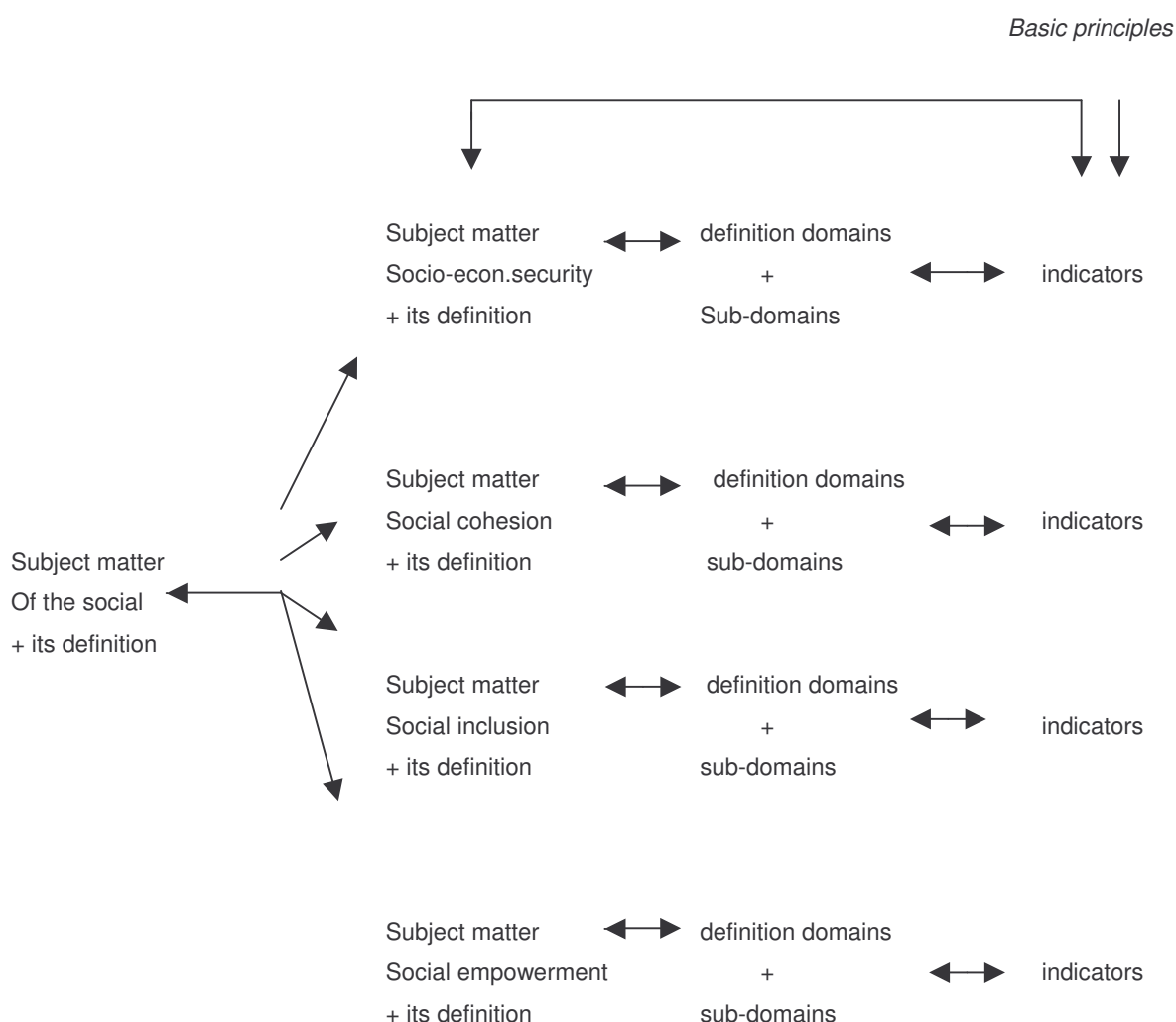
This theme is presented for the first time in the Foundation's second book of January 2001 and will be elaborated in the Foundation's third book. The relationship between the constitutional factors and the conditional factors – theoretically and practically – will be analysed. For the European Network on Indicators of Social Quality the nature of the conditional factors in the fourteen national countries is the 'heart of the matter'.

4 The national reports about the indicators of social quality

4.1 The steps made by the network

The measurement tools of the conditional factors are indicators. Indicators of social quality are thus – to be precise – 'indicators of the conditional factors of social quality'. As said, the network's challenge was to develop a robust set of these indicators. A condition was to clarify and to elaborate the social quality theory. This was done by applying deductive and inductive approaches that increased the understanding of the nature of the four conditional factors substantially. Thanks to four plenary sessions of the network's participants and three plenary sessions of their assistants, all those engaged could reach an agreement on the final definition of the four conditional factors, and recognise their domains and sub-domains. This delivered the consensus necessary for the development of indicators for all sub-domains that are relevant for the understanding of the nature of the conditional factor in question. The outcomes of this process are presented in the national reports. The following steps are made to syntonize all relevant concepts and to define the set of indicators: firstly, to determine the subject matter and definition of the conditional factors; secondly, to relate these definitions to each other as well as to the subject matter of 'the social'; thirdly, to determine the conditional factors' most essential domains; fourthly, to determine the nature of the sub-domains. As argued already these steps were based on the reciprocity between empirical explorations in the different countries and theoretical elaboration of the conditional factors of social quality, thus between inductive and deductive approaches. It may be illustrated as follows:

Figure-2 Determination of related concepts

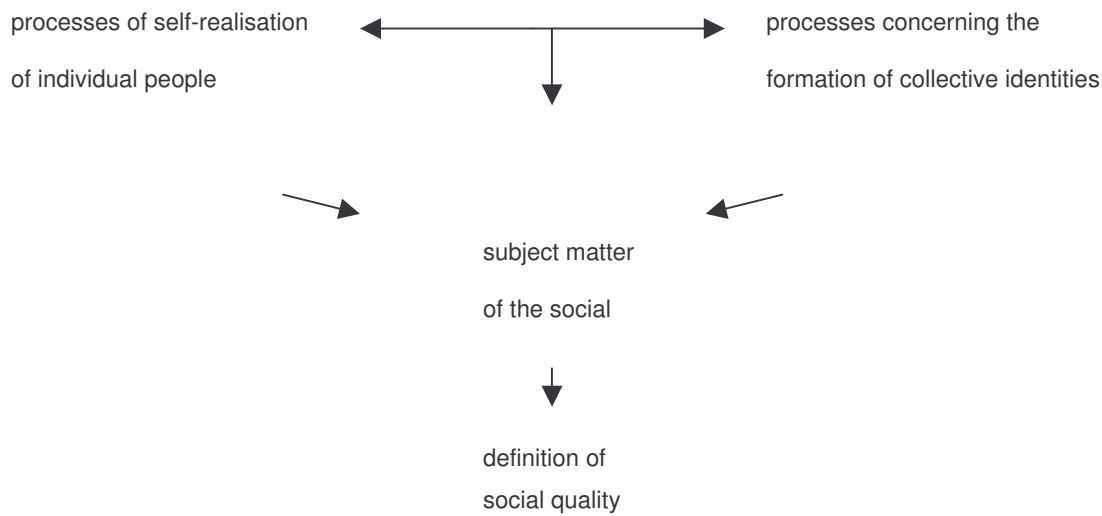


4.2 The definitions of the four conditional factors

The process resulting in the definitions of the relevant concepts will be extensively described in the network's Final Report. At this stage we will only present the consensus about the definitions of 'the social' and the four conditional factors.

The social will come into being thanks to the outcomes of reciprocal relationships between processes of self-realisation of individual people as social beings and processes leading to the formation of collective identities. Its subject matter concerns the outcomes of this reciprocity. The definition of social quality is based and derived from this reciprocity. **Social quality** is the extent to which people are able to participate in the social and economic life of their communities under conditions which enhance their well-being and individual potentials.

Figure-3 Subject matter of 'the social' and the definition of social quality



The herewith related definitions of the four conditional factors are:

- Socio-economic security is the extent to which individual people have resources over time.
- Social cohesion is the nature of social relations based on shared identities, values and norms.
- Social inclusion is the extent to which people have access to and are integrated in different institutions and social relations that constitute everyday life.
- Social empowerment is the extent to which personal capabilities of individual people and their ability to act are enhanced by social relations.

We mean by individual people, 'social beings' that interact with each other and influence the nature of collective identities. These collective identities on their turn influence the possibilities for self-realisation of the individual people. Thus this theory is oriented on social life, not on individuals potentials only. The theory rejects individualistic oriented propositions. Furthermore, there exists a form of overlap between the four conditional factors. This plays a role on the level of defining domains for the factors. In some cases domains can play a role in two or three different conditional factors. But the way of analysing these domains will differ by their sub-domains and indicators, because they are determined by the specificity of the conditional factor in question.

5 Conclusions

In all national reports the domains, sub-domains and indicators are presented in order to assess the data availability for these indicators. At this stage we will summarise some results of this approach:

- The indicators reflect processes of interacting social beings. In comparison with other approaches, the social quality approach has paid a lot more attention to the theoretical foundation of the indicators. It distinguishes ‘the social’ from the economic. Or more precise, the economic is seen as an aspect of ‘the social’ as is the cultural, the juridical etc. This prevents the trap of explaining social policy (or welfare policy) as a productive factor for economic policy and economic growth. The social has its own *raison d’être*.
- For the first time in the academic world concepts as socio-economic security, social cohesion, social inclusion and social empowerment are theoretically related with each other. The social quality theory demonstrates the intrinsic affinity of these four conditional factors. Herewith it addresses the existing scientific and policy-making fragmentation.
- Thanks to the applied method we have the possibility to analyse the nature and relationships between different policy areas. For example the relationship between economic policy, social policy and employment policy – see the Lisbon strategy – cannot be properly analysed without an intermediary. Social quality and the knowledge about the nature and changes of the four conditional factors deliver the points of departure for such an intermediary.
- The network has constructed indicators for measuring the nature and changes of the four conditional factors. By applying these indicators we dispose of a new tool for international comparison that is based on theoretically grounded concepts. Thanks to the application of this tools we are able to analyse the convergence and divergence between the Member States of the European Union with regard to these conditional factors of social quality. This could have added value for international comparison.
- Thanks to the assessment of the data availability of the indicators – as is done in each national report – we recognise the highly differentiated character of the countries of the European Union. This differentiated character cannot be captured by a reduction to a small number of social models. At the same time we recognise an intrinsic affinity in the emphasis on equity and solidarity between most of the countries involved. This outcome of the national reports will deliver good points of departure for future research on the comparison of the essence of the developmental approach of the European Union, the USA and the Asian countries.