



# Social justice and the Portuguese Welfare State – National Report

Laura Brito

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## About ETHOS

*ETHOS - Towards a European Theory Of Justice and fairness* is a European Commission Horizon 2020 research project that seeks to provide building blocks for the development of an empirically informed European theory of justice and fairness. The project seeks to do so by:

- a) refining and deepening knowledge on the European foundations of justice - both historically based and contemporarily envisaged;
- b) enhancing awareness of mechanisms that impede the realisation of justice ideals as they are lived in contemporary Europe;
- c) advancing the understanding of the process of drawing and re-drawing of the boundaries of justice (fault lines); and
- d) providing guidance to politicians, policy makers, activists and other stakeholders on how to design and implement policies to reverse inequalities and prevent injustice.

ETHOS does not only understand justice as an abstract moral ideal that is universal and worth striving for but also as a re-enacted and re-constructed 'lived' experience. This experience is embedded in legal, political, moral, social, economic and cultural institutions that claim to be geared toward giving members of society their due.

In the ETHOS project, justice is studied as an interdependent relationship between the ideal of justice and its manifestation – as set out in the complex institutions of contemporary European societies. The relationship between the normative and practical, the formal and informal, is acknowledged and critically assessed through a multi-disciplinary approach.

To enhance the formulation of an empirically based theory of justice and fairness, ETHOS will explore the normative (ideal) underpinnings of justice and its practical realisation in four heuristically defined domains of justice - social justice, economic justice, political justice, and civil and symbolic justice. These domains are revealed in several spheres:

- a) philosophical and political tradition;
- b) legal framework;
- c) daily (bureaucratic) practice;
- d) current public debates; and
- e) the accounts of vulnerable populations in six European countries (Austria, Hungary, the Netherlands, Portugal, Turkey and the UK).

The question of drawing boundaries and redrawing the fault-lines of justice permeates the entire investigation.

Utrecht University in the Netherlands coordinates the project, and works together with five other research institutions. These are based in Austria (European Training and Research Centre for Human Rights and Democracy), Hungary (Central European University), Portugal (Centre for Social Studies), Turkey (Boğaziçi University), and the UK (University of Bristol). The research project lasts from January 2017 to December 2019.

## EXECUTIVE SUMMARY

The following deliverable is part of the WP5 'Justice as lived experience'. The objective is to examine the experience of those vulnerable to political, economic and social injustice. The present deliverable, D5.5., aims to explore justice from the perspective of recipients of unemployment-related state benefits.

This deliverable addresses the following questions: what do people understand to be the relation between contemporary welfare states and social justice? Is the welfare state an expression of social justice or is it an unjust limitation of freedom? Does it promote equality or entrench discrimination?

Following the guidelines proposed by the coordinators of WP5, the Portuguese study combines desk research with an analysis of documentary legal and policy analysis and quantitative data. The result of this is presented in Part I of the report and aims to map the retrenchment of the welfare state since 2008, identifying key policy changes, in what domains of the welfare state, who has been prioritised, what has been ring-fenced, who has been 'sacrificed' and what disputes have emerged. The first part of the study also offers an analysis of the consequences for unemployed disabled people, non-national, young adults and how the consequences are gendered. This set the stage for the fieldwork based second part of the report. For this second part, social workers and claimants of social assistance were interviewed. With the information and lived experience of the participants, it is possible to trace what idea of deservingness is implicit in the discourses and how the retrenchment of the welfare state impacted the lives of many people.

The research shows that, as identified in other deliverables of the ETHOS project, the Portuguese welfare state is supported by a strong welfare society that in some ways prevents claimants from feeling wronged by the system. Without informal networks of aid and third sector institutions, the financial crisis would have been far more damaging to people's lives and probably created more controversy about who deserves more and why they were not being helped in time of crisis. Nonetheless, a deep study on this matter would be important to identify the key questions surrounding the Portuguese welfare state and deservingness.

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## **LIST OF ABBREVIATIONS**

COP – Career Orientation Program

CRPD – Convention on the Rights of Persons with Disabilities

EU – European Union

GDP – Gross Domestic Product

IPSS – Instituições Particulares de Solidariedade Social [Private Institutions of Social Solidarity]

ODDH – Observatório da Deficiência e Direitos Humanos [Disability and Human Rights Observatory]

PS – Partido Socialista [Socialist Party]

PSD – Partido Social Democrata [Social Democratic Party]

SEF – Serviço de Estrangeiros e Fronteiras [Immigration and Borders Service]

SII – Social Insertion Income

SS – Segurança Social [Social Security Services]

SUB – Social Unemployment Benefits

UB – Unemployment Benefits

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## INTRODUCTION

Portugal has been economising on social justice, with profound impacts on the welfare state. This is observable almost from the beginning of the welfare state in the country. Indeed, one can trace the first retrenchments before the financial crisis that struck Europe and led to the Portuguese government requesting a bailout in 2011. The specificities of the ‘economy’ can be explained if one analyses the characteristics of the Portuguese welfare state. In the extant literature three different approaches regarding Southern Europe welfare states can be identified: 1) The underdeveloped version of Esping-Andersen’s (1990 in Zartaloudis, 2014)<sup>1</sup>, explaining it as a conservative or corporatist model; 2) The Southern Europe welfare state as sharing a set of distinctive features that led to a unique type (Zartaloudis, 2014); and 3) The Southern Europe welfare state – in reality, a welfare society where social protection is provided by the family and social networks, rather than the state, resulting in a ‘social welfare regime’ (Santos, 1992). Common to these approaches is the understanding that the weakness of the Southern European welfare state has produced low employment rates, high poverty, high inequality and a strong division between labour market insiders and outsiders, limited redistribution and inefficient welfare spending. As has been explained in other ETHOS deliverables<sup>2</sup>, the Portuguese welfare state can be considered a quasi – or lumpen – welfare state (Santos, 1991). In general terms, it approximates more to the Anglo-Saxon mode, in relation to the range of services and the type of instruments it aims to provide, as well as the financing mechanisms, but less in relation to the scope and quality of services it offers (Santos, 1991).

Portugal’s admission to the EU in the 1980s was a turning point for the country; it meant admittance into (Western) Europe policymaking, in political terms. It also meant access to substantive financial, cognitive and strategic resources. Portugal has, since then, benefited considerably from EU structural funds, vital to financing public services and to developing several social policies, in order to adapt to the European Union ‘way of thought’. One major example was the creation of a minimum income scheme, later renamed ‘Social Insertion Income’ (SII – see Meneses et al., 2018; Brito, 2018). The effort made by the Portuguese government to match high European standards and the strong welfare state, unfortunately, was not complemented by a growing economy.

The first problems within the Portuguese welfare state seem to begin with the reestablishment of the democratic system, in 1974-1975. The long period of dictatorship made it impossible for Portugal to take advantage of the thirty years of post-World War II economic growth that help to create the basis for a mature welfare state in several European countries (Caleiras, 2011: 119). The democratic revolutionary process initiated in 1974 changed the scenario. With particular intensity during the first two years, various governments embarked on a strategy of income redistribution and guaranteeing social and labour rights. In 1974 wages rose in an unprecedented way, a statutory minimum wage was established, a social pension was created, the statutory minimum pension was doubled, and the highest salaries and pensions were subjected to a ceiling (Guillén *et al*, 2003: 19). During that period, the purchasing power of workers increased significantly, the result of the rise in wages in the second half of the 1970s (Caleiras, 2011: 119).

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<sup>1</sup> This topic is analyzed in detail in Meneses et al. (2018).



The 1987-1995 social democratic government initiated some successful and popular reforms with the support of EU funding, aimed at encouraging private initiatives and improving public finances. These reforms led to economic expansion between 1993-2000 (OECD, 2001). Between 1995-2001, public spending grew by eight per cent per year, and thousands of new jobs were created (EIU, 2002 IN Zartaloudis, 2014: 437). Nonetheless, weaker economic growth, when compared with other European countries, associated with high unemployment rates continued to shape Portuguese economy throughout the 2000s. The socialist governments of 2005-2012 implemented several cuts and reforms in order to control the deficit and to stimulate growth. However, these reforms did not have the expected results and, in April 2011, Portugal requested a bail-out, with devastating social, economic and legal impacts (Meneses et al., 2018).

The Portuguese social protection system is a sub-protective system<sup>3</sup>, and this sub-protection increased with the changes in more recent years. However, the period of financial assistance from *Troika*<sup>4</sup> weakened the situation of the unemployed in Portugal and the system has left unprotected a growing number of persons, and the increase in long-term unemployment suggests that the system is inefficient in reducing unemployment time (Valadas, 2013). Currently, for a vast sector of the Portuguese population (63%), unemployment remains the main concern (Marques *et al*, 2016: 196), a reality that is a consequence the low protection created by a weak welfare state.

## PART I | RETRENCHMENT OF THE WELFARE STATE

### 1. SOCIAL ASSISTANCE AND UNEMPLOYMENT – SOME NUMBERS

Portuguese social assistance provides three types of unemployment benefits, namely:

**Unemployment benefit (UB)** – this benefit is proportional to the income before unemployment. To access the benefit a person must have worked and paid taxes for social security for a minimum of 360 days in the 24 months prior to the date of unemployment; to access this benefit, claimants must have worked 180 days, with earnings registered in the 12 months prior to the date of unemployment (DPS, 2019a).

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<sup>3</sup> “A sub-protective regime is a system that offers the unemployed less than the minimum level of protection needed for subsistence. Few of the unemployed receive benefits, and when they do the amount is low. Active employment policies are virtually non-existent. In this type of regime, it could be expected that the unemployed will be experience severe financial difficulty and live under the poverty threshold. The probability of long-term unemployment is also high, even though this is also likely to be conditioned by other factors such as the level and pattern of economic development” (Gallie & Paugam, 2000).

<sup>4</sup> As described in Meneses et al (2018), the *Troika* moment refers to the implementation of the understanding memorandum signed in May 2011 between the Portuguese State, from one side, and the International Monetary Fund, the European Commission and the European Central Bank, on the other. This memorandum aimed at bailing-out the Portuguese finances, by balancing public finances and increasing competitiveness of national economy (with little success). The memorandum is available at [https://infoeuropa.euroid.pt/opac/?func=service&doc\\_library=CIE01&doc\\_number=000046743&line\\_number=0001&func\\_code=WEB-FULL&service\\_type=MEDIA](https://infoeuropa.euroid.pt/opac/?func=service&doc_library=CIE01&doc_number=000046743&line_number=0001&func_code=WEB-FULL&service_type=MEDIA) (accessed in February 2019).

**TABLE 1 - NUMBER OF INDIVIDUALS/YEAR RECEIVING UNEMPLOYMENT BENEFITS (2008-2017)**

Year	Number of individuals
2008	181.261
2009	244.134
2010	233.116
2011	261.093
2012	331.357
2013	309.081
2014	245.668
2015	204.370
2016	176.231
2017	150.806

Individuals who receive unemployment benefits have the obligation to inform the Social Security Services (SS) regarding any situation that can lead to the suspension or termination of the benefits (DPS, 2019a). Regarding the employment centre, the beneficiaries have the obligation to:

- 1) accept and comply with their personal employment plan; 2) accept convenient work, socially necessary work, professional formation and other existing active employment measures; 3) look actively for a new job, in accordance with their personal employment plan, and proving to the Employment Centre that they are doing so; 4) comply with evaluation measures, accompaniment and control determinate by the Employment Centre (DPS, 2019a).

The benefit cannot exceed 1.089,40€ per month, nor be less than 435,76€ (DPS, 2019a: 16). In case of noncompliance, registration with the Employment Centre is revoked and the beneficiary can lose access to unemployment benefits.

**Social Unemployment Benefits (SUB)** – provision of a fixed amount, with less demanding prior conditions to access it. In order to access the benefit, it is mandatory for a person to have worked at least 180 days, with an income registered in the 12 months prior to the initial date of registering as unemployed. Those applying a second time for this benefit must have exhausted the periods of unemployment benefit granted as well as demonstrate he/she remains unemployed and is enrolled in an employment centre. In both cases, property and monthly income of the household is taken into consideration in order to define the value of benefits (DPS, 2019b).

**TABLE 2 – NUMBER OF INDIVIDUALS/YEAR RECEIVING SOCIAL UNEMPLOYMENT BENEFITS (2008-2017)**

Year	Number of individuals
2008	81.017
2009	118.565
2010	62.093
2011	56.019
2012	68.866
2013	67.836
2014	60.391
2015	56.627
2016	46.299
2017	32.880

Individuals who receive the SUB have the same obligation towards the Social Security and the Employment Centre as those who receive unemployment benefits (DPS, 2019b). Beneficiaries who live alone receive 348,61€ or 435,76€ if they live with their family (DPS, 2019b:18).

**Social Insertion Income (SII)** is a support designed to protect people living in extreme poverty; it's a cash benefit to ensure satisfaction of minimum needs. It also entails an insertion in a program-contract depending on the characteristics and conditions of the household, and aiming at promoting the social, labour and community integration of the beneficiaries. Access to SII depends on the value of the total income of the household (DPS, 2019c).

**TABLE 3 – NUMBER OF INDIVIDUALS/YEAR RECEIVING THE SOCIAL INSERTION INCOME**

Year	Number of individuals with SII
2008	418.291
2009	486.812
2010	526.382
2011	448.107

2012	420.022
2013	360.372
2014	320.554
2015	295.664
2016	287.473
2017	288.112

Individuals receiving the SII must notify the Social Security of any changes that may lead to the suspension or termination of their right to access the SII. They need to provide to Social Security Services documents proving economic hardship; they are also required to attend a meeting convened by the Local Insertion Centre where and when the insertion contract is defined (including the obligations to be fulfilled by the claimant), signed and reviewed (DPS, 2019c). In contrast with other benefits, the beneficiary's household is also subject to obligations, in order to sustain the benefit. These obligations are similar to those required from the principal claimant and, if necessary, the household can be asked for a declaration authorizing the access to banking information or the presentation of bank documents considered relevant to evaluate economic condition of the household (DPS, 2019c). There are no fixed values regarding this benefit as it depends on the income of the claimant household.

## **2. RETRENCHMENT SINCE BEFORE AND AFTER THE FINANCIAL CRISIS**

In order to understand the Portuguese national case, not only we need to map the welfare state retrenchment between 2008 to 2018, but also what happened prior to the crisis. Since 2002, the centre-right government implement several cost-cutting measures such as:

[...] it closed 30 public organizations, froze the hiring of permanent public sector employees, froze pay rises for salaries above 1000€, announced that no temporary employment contracts in the public sector would be renewed (a measure that resulted in up to 50,000 redundancies), implemented a reorganization of existing public sector staff by allowing the horizontal interdepartmental transfer of employees and introduced – but failed to actually implement – an entirely new system of promotions based on individual performance evaluations (Zartaloudis, 2014: 440).

Between 2004-2009, the Socialist government continued with more austerity measures:

[...] including tax increases and wide-ranging public administration reforms. The government targeted especially public-sector employees in order to meet its medium-term stability programme projections of a gradual decrease of the general government deficit from 4,6% of GDP in 2006 to 3,7% in 2007 and 3% in 2008 [...] The Socialist government maintained the salary freeze for those earning more than 1000€ and also

implemented a freeze on promotions and career advancement, and increased the retirement age along with reducing pensions for public sector employee [...]. In 2008, the Socialist government was reported to have maintained the goal of making redundant around 75,000 public sector employees, even though the share of public employment in the overall workforce in Portugal was below the EU average [...]. Lastly, the Socialist government transformed employment relationships for the employees in the police, the army and the judiciary, by converting their contractual status into individual employment contracts (Zartaloudis, 2014: 440).

After that, in 2010, the government implemented a pay freeze for public sector employees (maximum pay rise of 0,8% in accordance with the inflation rate) (Lima, 2010a). On top of these measures, financial penalties for early retirement were added, increasing the annual cut of 4,5% for each year before the legal age of retirement to 6%. The next cuts came in May 2010, with the end of training and employment subsidies and extension of unemployment benefits to tackle the negative effects of the economic crisis (Lima, 2009). A few months later, additional measures were implemented due to market pressure:

An overall 5% cut in core and wider public sector remuneration expenses from 3,5% to 10% cut to salaries over 1500€ per month and a freeze on all promotions, lower spending on pensions, allowances and social benefits and a freeze on public sector investment. The proposals also included public sector restructuring, which could result in redundancies and privatization of public corporations (Zartaloudis, 2014: 441).

In March 2011, the Socialist government proposed another austerity package which included dramatic cuts in social assistance and health budgets, along with a pension freeze (Zartaloudis, 2014). Those measures were rejected by the Parliament and the Prime Minister was forced to resign. Two months later, Portugal requested financial assistance. This was the turning point from which unemployment became structural, a phenomenon resistant to traditional political solutions. Despite some stimulus to employment, the central concern was to compensate for the lost income through benefits, but always taking into account the austerity measures imposed. The result of this approach was that the duration of the unemployment benefit became no longer enough for the individuals to obtain a new job, and yet, public spending with unemployment subsidization reached significant levels (Caleiras, 2011). Everything that happened after the bail-out/*Troika* memorandum only came to sustain the weakness of the Portuguese welfare state.

In October 2011, the centre-right government introduced an additional austerity plan for the 2012 budget. Regarding labour, the major changes introduced were:

**Unemployment benefits:** 1) reduction of the maximum duration of unemployment benefit to 18 months (Decree-Law no.64/2012); 2) reduction of the amount of unemployment benefits (Decree-Law no.64/2012); 3) reduction of the tax period required to access unemployment benefit (Decree-Law no.64/2012); 4) extension of eligibility for unemployment benefits to self-employed persons, who regularly provide services to a single employer (Decree-Law no.65/2012) (see Meneses *et al*, 2018: 16).

**Employment protection:** 1) reduction of compensation for termination of employment contract (Law no.53/2011); 2) individual dismissal made more flexible (Law no.23/2012) (Meneses *et al*, 2018: 16).

**Work times:** work time made more flexible (Law no.23/2012) (Meneses *et al*, 2018:16).

**Wage fixations:** 1) freezing of the minimum wage update; 2) review of the criteria for the extension of collective agreements (Resolution no.90/2012 of the Council of Ministers); 3) reduction of the validity of expired contracts, replaced by new ones (Law no.55/2014); 4) decentralization of collective contracting (Law no.23/2012) (Meneses *et al*, 2018:16).

The *Troika* also demanded the freezing of almost all social benefits and pensions, the reduction of unemployment benefits associated with social integration income, family benefits and assistance aid (Hespanha *et al*, 2013). Despite the drastic cuts, some protective measures were created during that period. The most important of them were: a) the enlargement of the supportive supplement for the elderly; b) the strengthening of social protection for individuals with disability; c) the increasing of family allowances for the most vulnerable (Hespanha *et al*, 2013). Changes in access to unemployment benefits widened the universe of potential beneficiaries (by reducing the guarantee period required to be entitled to the benefits of 15 to 12 months), but at the same time, it reduced the maximum duration of the subsidy (Hespanha & Caleiras, 2017).

EU austerity policies, especially in Southern Europe, led to massive job losses, rising prices, loss of skilled labour (with a massive migration towards northern-central Europe and other places), as well as a rising in poverty, inequalities and oppression of citizens (Duarte, 2015). In Portugal, the problems of austerity were in part attenuated by the welfare society (Santos, 1994), the non-assistance by the State during that period emphasized the importance of informal networks of solidarity (Lopes & Frade, 2012; Santos, Teles & Serra, 2014), showing how those social networks are (re)configured in ways that help supporting the more important needs of families, such as food provision, shelter, and basic health care (Ribeiro *et al*, 2015).

The financial bail-out did not solve the structural problems of the Portuguese economy and society. On the contrary, it impoverished the society, creating more precarious work, aggravating inequalities and pushing and skilled young adults towards emigration. In addition to the most visible wounds created by the financial crisis, there are other more profound and more difficult problems to cure, such as the feeling of hopelessness, the lack of confidence in the viability of alternatives, and the increased suspicions towards contemporary politicians and politics (Silva *et al*, 2015).

### **3. CONSEQUENCES OF UNEMPLOYMENT FOR VULNERABLE GROUPS**

In this section of the report, a short reflection on the consequences of welfare state retrenchment for some vulnerable groups is presented.

#### *DISABLED PERSONS*

Regarding unemployed disabled people, the consequences of welfare state retrenchment goes along with older problems: poor access to labour market, low income, high incidence of poverty, dependence on money transfer and social benefits, difficulties in accessing services, lack of institutional responses, lack of social activism and limited capacity to mobilize and to claim rights (Portugal, 2016). In 2013 the

Portuguese Association of Disabled Persons commented that the state budget impacted especially on the "citizens who are socially more unprotected", maintaining that the measures taken had negative repercussions for the life of people with disabilities (IN Fontes, 2009). However, the data and studies on the impact of the austerity of this part of the population are scarce.

For disabled people, economic growth between 1995-2001 meant an increase in schooling levels, an improvement in the employment situation and increasing money transfers related to social benefits (Portugal, 2016). These changes did not erase existing inequalities since those improvements were also benefiting non-disabled persons. The economic crisis and austerity measures increased the problems identified, meaning a retrenchment from the limited improvements of the last decades.

The end of the bailout saw a reduction in social benefits, the elimination of services, a reduction in human resources, the privatization of additional public services and cuts in funding programs and services for disabled, in particular in employment, education, health and social services (Pinto & Teixeira, 2012). Between 2009 and 2011, public expenditure on the rehabilitation system for disabled persons was reduced by 62% and the number of beneficiaries of the program decreased by more than 26% (Pinto & Teixeira, 2012). Cuts were made without the implementation of alternative/compensatory measures, leaving a policy gap with a profound impact on the lives of persons with disabilities (Pinto & Teixeira, 2012).

The 2018 report of the *Observatório da Deficiência e Direitos Humanos* (ODDH) draws a devastating picture of the impacts of the austerity measures: between 2011 and 2017 the unemployment of disabled persons increased by 24% (Pinto & Pinto, 2018). In 2017, the majority of unemployed disabled persons were over 25 years old (86,6%); 81,6% were searching for their first job and 60,4% had been unemployed for more than a year (Pinto & Pinto, 2018). This has produced a greater risk of poverty and social exclusion, and one can say that the austerity measures jeopardize the improvements that had been achieved with the ratification of the CRPD, in 2009.

### *NON-NATIONALS*

The unemployment of non-nationals' is somehow considered a new phenomenon (Valadas *et al*, 2014: 55). This approach is also contradictory as 'immigrants came to Portugal to occupy economic sectors where there is a lack of workforce', as the official information states (Valadas *et al*, 2014: 55). The 2011 Census showed that unemployment is higher among non-EU immigrants (19,8%) compared with EU immigrants (13,9%). Similar to Portuguese nationals, unemployment rates are higher among immigrant's women than among men (Esteves, 2017).

Unemployment benefits are hard to access for non-nationals, and Social Insertion Income even harder. The demands in terms of residency documents, social security payments and the contractual vulnerability of many foreign workers explain why the access is compromised. Data from Unemployment Centres indicate that the number of unemployed immigrants grew until 2011. This peak marks the moments when the austerity measures and the new rules to access unemployment benefits came into force resulting in a dramatic decrease in the number of nationals and non-national registered (Esteves, 2017). Esteves (2017: 68) present in an analysis of the life conditions and labour market insertion of immigrants in Portugal, non-published data from social security (Esteves, 2017: 68)

that shows that non-nationals normally receive lower unemployment benefits than national. The difference between unemployment benefits are a reflection of the pay gap between nationals and non-national, as the unemployment benefits are directly related to the salary earned in time prior to unemployment.

The vulnerability of the non-national unemployed is also shaped by the (in)stability of their residency. The renewal of visas depends on the proof that the applicant can sustain themselves which is closely linked to formal employment. It may be impossible to prove in cases of unemployment. SEF pledges that if a non-national has access to unemployment benefits, the renewal of the documentation is guaranteed. Nonetheless, each case is individually analysed, with a close surveillance of the individual record, their family conditions and the existence of a third person who can guarantee the subsistence of the individual.

The results of a research coordinated by Ana Claudia Valente (2016) show that the vast majority of unemployed immigrants have their income coming from a member of their family, as well as from sporadic work. Only 19% of the study participants (Valente, 2016) referred to unemployment benefits as an income. The average monthly income of the participants, after taxes, was between 300€ and 599€.

#### *YOUNG ADULTS*

After 2008 it became more difficult for young adults to access unemployment benefits. Young people face two problems: the absence of jobs vacancies and the required pre-conditions and experience to obtain a job. Many times employers request workers be able to prove months or even years of past experience, and are unwilling to give an opportunity to inexperienced workers. The second problem is that, without having previously worked or paid taxes for social security, it is almost impossible to access any kind of social assistance. This has led to many situations of young adults returning to living with their parents, or parents (sometimes already retired) having to support their children or return to work to provide some assistance to their family (Adão & Pereira, 2012).

During the economic crisis unemployment grown, particularly among the younger population (see Table 4). Also, in 2002 82,9% of the unemployed population had access to some kind of benefit and in 2012 this percentage fell to 44,8%. This led to an unemployed population in a situation of extreme fragility (Ribeiro *et al*, 2015). In 2012, 40% of the unemployed persons were in a situation of poverty (Ribeiro *et al*, 2012).



**TABLE 4 – PERCENTAGE OF UNEMPLOYED POPULATION BY AGE GROUPS IN 2011 AND 2013**

Age group	% of unemployed individuals (2011)	% of unemployed individuals (2013)
15-24	9,4%	37,7%
25-34	4,1%	19%
35-44	3,2%	14,3%
45-54	3%	13,8%

Source: Ribeiro et al. (2015)

Below is an excerpt from one of the interviewees for D6.2. (Meneses *et al*, 2018) regarding the impact of the austerity measures in their life as young adults:

**Woman** – we, after the *Troika* intervention, during the period that followed, we did not even think about having children. Even if we wanted to, it was not even a possibility. Now it is a possibility, more due to the age than to an actual improvement of our living conditions [...]. I have a time frame to get pregnant, which is how long my contract lasts. At the moment, I am in a relatively friendly context, working with people I like; it is not a hostile environment, but even so, with these one-year-contracts, we always do the maths in the attempt to get pregnant so that when the baby is born, I can take four months leave and return within the contract. I cannot be on leave at the time of contract renegotiation, because they may think that I am in limbo, am I with them or am I not, they need someone, and they choose someone who's available.

**Man** – you not only have an extremely precarious employment relationship, but the very work organisation is structured differently. You have an institutional email address now, you have smartphones, you're always working. We're always working [...] with precariousness, with unequal power on which the precarious working relationship is based, you are always running, you are a little soldier [PT6.2.06]. (Meneses *et al*, 2018:42)

#### *HOW ARE THESE RELATIONS GENDERED?*

The rapid economic and social transformations that followed the (re)installation of democracy in 1974 led to a massive feminization of the Portuguese labour force, reaching 40% in 1991 and 47% in 2008 (Meneses *et al*, 2018). Nonetheless, studies show that within the family, gender roles and asymmetric housework division prevails (Ribeiro *et al*, 2015). Austerity policies of 2011 had distinct gendered impacts (Meneses *et al*, 2018:33). Economic contraction had multiple impacts upon women, namely: the weakening of contractual ties; the rise of job insecurity; the rise of unemployment; the reduction of social transfers and the risk of poverty.

Women constitute an important labour reserve and are generally mobilized during times of economic growth and dismissed during the recession (Souza, 2015). Unemployment began to hit the country in 2008, as stated already. From then on, and until 2014, 464,900 men lost their jobs compared to 211,900 women (Ferreira & Monteiro, 2015). Between 2008 and 2011, two out of three jobs lost were occupied by men (Ferreira, 2014). Studies indicate that men lost employment as wage earners and women as isolated self-employed workers. The explanation for this is that women were no longer able to work in an independent activity own by them or some familiar activity due to business failures.

Some of the measures applied at combatting the public deficit were intended to reduce the 'privileges of the public servants' through salary cuts, freezing carers, changes in retirement policies; restructuring public administration by merging or eliminating jobs; increasing direct and indirect taxes; total or partial privatization of public enterprises; deregulation of labour relation and flexibilization (Ferreira & Monteiro, 2015). Those measures hit the highly feminized public administration sector (Ferreira & Monteiro, 2015). Between 2011 and 2015, 30,551 men and 40,814 women lost their jobs in public administration and those who remained employed saw their career progression freeze and an increase in working hours and workloads (Ferreira & Monteiro, 2015).

The retrenchment of the welfare state and the socio-labour marginalization of women have compromised their economic, financial and political autonomy (Souza, 2015). The Feminist Anti-Austerity Campaign Report (2013 in Souza, 2015) states that:

cuts in state social expenses presuppose an increase in domestic work and unpaid care, which is usually borne by women [...] this lack of resources translates into a powerful speech that undermines, subordinates, oppresses and prevents access to active and full citizenship (RCFAA, 2013, 5-6 in Souza, 2015, 260-261).

Less protection by the state means an overload of the welfare society and, consequently, of women (Souza, 2015). Ferreira and Monteiro (2015) indicate that in 2014, 68,6% of the registered people in unemployment centres did not receive any kind of benefit. This led to families having to bear and compensate for the lack of social protection, especially for young people with limited access to the labour market and with precarious and insecure employment situations (Ferreira & Monteiro, 2015). Intergenerational and family solidarity (Frade & Coelho, 2015) was a fundamental strategy for the maintenance of social stability during the crisis. Families, especially their female members, have borne the cost of unemployment, precariousness, and the cuts in formal protection (Ferreira & Monteiro, 2015).

#### **4. DESERVINGNESS**

It is not surprising to see discourses about 'deservingness' emerging in times of crisis, especially when those times are accompanied by a restriction on welfare, as happened between 2008 and 2018.

With the crisis, the financial bailout and the retrenchment in social assistance, the discourses on deservingness changed. In the public debate, this change materialised in two main ways:

1. As 'Parasites' – linked to the 'minimum income earner'. Some political parties have insisted that some minorities such as Roma and inhabitants of the periphery (especially afro-

descendants) are 'social parasites' because they have access to social assistance without supposedly deserving it (see D4.2. Portuguese National Report).

2. As 'Privileged' – in the case of retired people the debate is more related to the violation of the state commitments and redistributive justice with an intergenerational dimension, that at one point was called a grey schism. That is, youngsters do not have social protection and do not know if they will have access to retirement benefits, whereas the older generation is seen as privileged. However, this is a relative privilege, since many elders suffered from cuts in pensions and the collateral damages of the situation of the rest of the population.

Unfortunately, it is hard to really trace a consistent narrative on deservingness in the Portuguese context. The impact of austerity measures on the notion of 'deservingness' in Portugal needs to be further explored. Quick research on social media with the keyword 'unemployment benefits' shows that there are many comments asserting that, for example, persons receiving the SII should be more controlled than those receiving unemployment benefits. Nonetheless, there are also comments aggressively stating that a vast majority of unemployed persons do not work because they are 'lazy' and that 'they have never worked'. In those cases, it is not uncommon that someone replies explaining that if someone receives unemployment benefit it is because they have previously worked. Social attitudes towards unemployed persons seems to cross-cut all 'groups' of people in society – women, men, nationals, non-nationals, etc. Manuel Villaverde Cabral in his work prior to the financial crisis (1999), pointed out that Portuguese popular feelings tend to blame the unemployed for their misfortune (Cabral, 1999: 233). This is mainly due to the cultural assumption that work is a social duty and not an individual achievement (Rodrigues, 1995). In the Portuguese national context, there is also a very strong family network providing solidarity against the struggles of unemployment, which may conflict with the idea of deservingness of social benefit. Therefore, the deficit of public welfare does not manifest itself in forms of social or political disruption (Santos, 1991) or in clear ideas of who deserves or not social assistance, since virtually all individuals have limited access to it.

Another particularity of the Portuguese welfare state is that at the moment of its establishment, the responsibility of the state to provide assistance was seen as a sign of benevolence and not related to social rights – a heritage of the fascist regime (Santos, 1991). This is still present in more recent behaviours towards social assistance. Social security is accompanied by a high vigilance from social workers towards claimants. Some social workers consider subsidies a charitable action to be granted only to those who prove to be 'good poor' (Caleiras, 2011), which justifies them being more controlled than claimants of other benefits (retirement pensions, maternity payments). Laurence Loison (2003) explains in her work that many social workers consider the assistance of the welfare state as a charity, and due to the lack of funds to assist everyone they can be, sometimes, more selective to whom the benefit will be attributed. This 'moralizing' stance about deservingness is shared both by social workers and the claimants. Added to this, many claimants believe that they are the only persons responsible for their survival (Dias & Reis, 1993 in Loison, 2003). If individuals do not recognize the importance of a functional welfare state and the responsibility of the state, they also will not see themselves (or others) as deserving of help. This can explain why in Portugal little attention seems to be paid to who deserves what in terms of welfare state benefits (Loison, 2003).

Wim van Oorschot (2006) revealed that in most of Southern Europe countries, elderly, sick and disabled people still score quite close in deservingness scales, but there are larger differences between

the solidarity towards unemployed people and immigrants (Oorschot, 2006). Nonetheless, some studies about the social perceptions of unemployed people in Portugal (Caleira, 2011) suggest that these social categories are not as socially stigmatized by their community as expected. Oorschot (2006) justifies this by arguing that people living in Southern, Central and Eastern Europe are less conditional in their approaches, due to lower social spending and being from less wealthy countries. In an earlier work (2000) he proposed five criteria regarding deservingness:

1. control: poor people's control over their neediness, or their responsibility for it. The less control, the more deserving;
2. need: the greater the level of need, the more deserving;
3. identity: the identity of the poor, i.e. their proximity to the rich or their 'pleasantness'. The closer to 'us', the more deserving;
4. attitude: poor people's attitude towards support, or their docility or gratefulness. The more compliant, the more deserving;
5. reciprocity: the degree of reciprocation by the poor, or having earned support. The more reciprocation, the more deserving.

For Charlotte Cavaillé (2015), to fully understand redistributive politics one must understand the deservingness beliefs of a given group. To sustain this idea, Cavaillé cite Fong, Bowles and Gintis (2006 in Cavaillé, 2015) who claim that:

Understanding egalitarian politics today requires a reconsideration of *Homo Economicus*, to unremittingly self-regarding actor of economic theory (...) we believe that conditional cooperation and punishment", in other words the willingness to help the deserving and punish the underserving, "better explains the motivations behind support for the welfare state (Cavaillé, 2015: 27).

The non-existence of studies about the perceptions of deservingness, the welfare state and social justice – especially during/after the financial crisis – in the Portuguese society can somehow be explained by the representation of who is responsible for the crisis. The research carried out by Kelly Rodrigues (2013) signals that the financial system and governments are identified as the ones accountable for the crisis and of the results following the austerity measures, and not the population or some minority groups, as may have happened in other countries during the same period (Rodrigues, 2013). Nonetheless, the absence of studies regarding those concepts makes it difficult to assess the real problematics arising from the retrenchment of social assistance in Portugal. Therefore, this will be further explored in the second part of this report based on the interviews with social workers, claimants and advocacy organizations with the hope that future research will explore this question.

## METHODOLOGY

The methodology used for this case study follows the guidelines designed by WP5 coordinators. It was divided into two parts. Firstly, desk research with the objectives of 1) mapping the retrenchment of the welfare state since 2008 and 2) mapping the consequences for three key categories of vulnerable people, namely unemployed disabled people; non-nationals; and young adults, with a focus on women. Desk research also included an academic literature review on welfare state, deservingness and unemployment benefits. The second part of the case study was carried out through semi-structured interviews with key informants. Social workers and claimants were interviewed regarding their view on the ideas of justice, the social assistance provided in Portugal during the economic crisis and ideas of deservingness. Representatives from trade unions were very difficult to contact, mainly due to several strikes that were ongoing during the fieldwork period which is why their opinion is absent from this report. We note that only women were interviewed. Social work is a very feminized career and they were the first persons willing to be interviewed. In the case of beneficiaries of social assistance, since the contacts for this deliverable were made through a social institution that helps children and their families, and although several parents (men and women) were contacted, the only who agreed to be interviewed were women.

## PART II | EXPERIENCES OF SOCIAL JUSTICE THROUGH THE WELFARE STATE – ANALYSIS OF INTERVIEWEES’ OPINIONS

### 1. EXPERIENCE OF SOCIAL ASSISTANCE<sup>5</sup>

#### *EXPERIENCE OF SOCIAL WORKERS*

F. (PT5.5.2.) is a social worker who started working with children and their families at the end of the 1990s. Her principle motivation in choosing social assistance as a career was to ‘make a difference to the life of others’. In her opinion, the key injustices of social assistance deserve in-depth analysis:

I think that there are situations [of individuals/families] that are not looked at in depth. And some measures taken are exaggerated [taking into account the situation] and other situations need action, and nothing is done [F.]

C. (PT5.5.3.) started working as a social worker at the end of the 1980s, her motivation comes from her personality: “[I wanted] to help others, to help them take better decisions according to their capacities. I think I had the profile to be a social worker, to be with the other, to help them” [C.]. She worked in several institutions of social assistance, and also with children and their families. Today, she works more as a secretary than directly with claimants of social benefits. In her opinion, the key injustices of social assistance are very blunt:

When you create a law, there is always a line [dividing who deserves or not based on their income]. The question is, who lives inside the line. There are always injustices in every

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<sup>5</sup> A random letter was assigned to each interview to guarantee the privacy of participants.

case. For plus 1€ you jump out, and for less 1€ you jump into the system [of benefits]. It's obvious that there must be a line, even for us social workers to check incomes and act accordingly. But this line creates injustice and inequality related to income. If this is correct, I do not know. We have to learn to live with them [the injustices]. We have families that do not receive benefits [because of their income] but live completely suffocated [because the income they have is not enough to their expenses]. [C.]

C. also explains that she cannot outline another way to define who can get benefits or not. She refers to the fact that a family with a given amount of income in Lisbon does not share the same problems as a family with the same income in the countryside, where family members may get more help from other family members, from the community, and can benefit from small scale agriculture. In her opinion, in rural areas people 'may live with less but have a better quality of life', although she recognizes that this is rather subjective. Either way, for her, geography also creates inequalities in social assistance, but she considers that:

social benefits are nothing more than a transitional process and people cannot get attached to it [depend on benefits in the long term]. But [in Portugal] we do not have a level of 'citizenship'<sup>6</sup> that allows people to do that. We have persons, regarding unemployment benefits, that wait until the very end of the benefit to start looking for a new job. And we have others that do not give up. Regarding the SII, there are people who use it as a bridge to a better life, and those who lives forever with it as a source of income [C.]

For C. the financial crisis did not increase the injustices of social assistance. In times of crisis or not, injustice is always present because there is a line that divides those who can or cannot receive assistance, and there is always a fluctuation in the value of unemployment benefit.

Unemployment benefit should be higher? I am not sure about that. We [Portuguese] do not have the notion of 'common good' and without this, people think 'Ok it's my right, I will use it until the end, and I do not care about the rest of the society'. If the amount were greater, a lot of people would continue receiving benefits [without doing anything to change their situation]. And also there are cases that are more complicated than others. [C.]

She refers to the situation of a young couple, both unemployed, who were forced to go back to live with their parents as one of the cases that shocked her most.

[A family] with very good living standards. Suddenly, they were both unemployed. Him, without the right to unemployment benefits, and they survived selling all their goods and only asked for help when they realized that their children were starving, because they were ashamed to ask for help [...]. We also had situations of people who were unemployed and easily overcame the situation. But we also had people who refused to work to earn

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<sup>6</sup> Citizenship in the sense of the idea of belonging to a global community.

less than before. But between earning some money, and nothing...It all depends on how each one positions himself, with his/her moral values, his/her sense of citizenship. [C.]

Intergenerational solidarity was, for C., very important to overcome some situations of families with both parents unemployed. She refers to a couple with children that did not live in their village of birth, but during the crisis when they became unemployed, they started visiting their parents in the village every weekend to come back to the city with some food given by their parents. C. says that 'at least the children have a good relationship with their grandparents, now'.

Regarding social benefits, C. considers that social workers could not make more during the crisis in the sense that they could not change the "mathematical formula" to calculate the benefit. However,

I believe that without the IPSS, families would have been in a worse situation than the one in which they actually found themselves. For this to happen, there must be committed social workers, attentive to this reality. There were people who [did not receive benefit] but were supported in one way or another. Without third sector organizations, both adults and children would have been worse off. I think we [people in general] always do more when we work with and for people. There are 'hallways of freedom'<sup>7</sup> to make more, beyond what is established by law. The law is restrictive, but we [social workers] look towards the community to see who can help. If we do not do this, we will fall far short of our capacities. The IPSS responded quickly [during the crisis] and if it were not for them, the crisis would have been more damaging" [C.]

C. is not sure if there are more protests against social assistance, but she knows that they are more visible and that people know how to draw attention. An example she gives is the use of social media to call attention to situations of injustice, even though she considers that media can make a situation look worse by distorting the reality. C. also considers that people are now more aware of their rights, and they do not accept everything a social worker tell them. She thinks that they are more empowered now, than 10 years ago, which helps them claiming their rights.

Regarding social benefits, F. considered that households in-between being very poor or very rich are those who are still more unprotected and that feel more wronged when they look at those who receive some benefit from social security, especially those who receive SII. Therefore, in her opinion,

those who work, who strive to pay their bills, to pay taxes, when they think about social benefits, they recognize that the measure is important to people who have nothing, but there is no counterpart. Then I see people feeling wronged. [F.]

In the opinion of the interviewees, there should be a counterpart for the beneficiaries of SII, such as community work:

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<sup>7</sup>This was an expression used by the social workers interviewed to designate the way the 'free' themselves from the formal system of social assistance, and use resources in the community to help claimants that fall outside the system.

To feel that we have all contributed to help each other's lives; that in a moment of crisis someone can be unemployed, but that they are available to compensate for the aid given [F.]

The SII should be accompanied by civic work. For me, it had to be this way, in order to ensure more justice for families who are struggling, but still working. We have families who have lower incomes than SII beneficiaries, but who work, and live with much less and still are contributing to our society. I think everyone has the right to social assistance, but I think they should also contribute to the civic part. If society is contributing to their minimum standard of living, they should also do something. [C.]

In the perspective of F., the financial crisis had a strong impact on injustices. This is visible not directly on the beneficiaries of unemployment benefits but on other situations of social assistance, such as through the budgetary cuts in hospitals that impacted in the aid given to patients. She gives the example of a woman she knew who had cancer and did not have a car or family/friends to accompany her to treatments, and who was denied transport aid to the hospital by social workers due to budgetary cuts. In her opinion, in moments of crisis it is fundamental to maintain basic social assistance, which did not happen in Portugal and this generated more inequalities.

Regarding access to social benefits, she mentions that during the crisis she worked with some applicants of social benefits and that persons from the middle class, especially teachers, a group she remembers well, struggled with the rules to access benefits

Teachers. They were in a very complicated situation. They could not get a job, but if they had worked three months prior to that they did not receive unemployment benefit, nor SIII because their income was too high for them to be entitled to the benefits. Or if they owned a house registered in the Portuguese Tax System and Customs Authority, it might even not have a roof, but it was considered a dwelling and therefore, they were considered as underserving [F.]

For F., either way, the impact of crisis differed strongly from case to case. There was less unemployment among higher classes of the Portuguese society, keeping them away from potential precarious situations. She thinks that part of the population still has no idea of what really happened. She explains that:

[I saw] in people with whom I have worked, how they were making a superhuman effort to survive! It is almost impossible to understand how people managed to cope with the crisis. [F.]

F. also identifies that during the time of the *Troika*, there was a lot of stigmatization of beneficiaries from middle class backgrounds; indeed, many of them were criticized for keeping their car and house when they were unemployed:

Why do they have to carry that burden and blame? 'There you go asking for social assistance, but you have a good car'. Do people need to sell their car and buy a bicycle instead, to be worthy of help? I do not think so! [F.]



Regarding her discretionary power and the assessment of benefits, F. thinks that during the financial crisis that 'power' was limited and, as C. as explained, social workers had to create 'hallways of freedom':

There were more rules [during the crisis/bailout]. We needed to create 'hallways of freedom' and resort to informal support. This was within our own power, as individuals. As a social worker, I felt a bit stuck [by the State rules]. The processes were restrictive, and I had to deal with it. I went to the civil society, looking for who was willing to help [F.]

Thus, the power she used was, in a sense, outside and beyond the rules and possibilities imposed by the government. A power that resorts to informal community networks:

I think this is the power that we, social workers, have – being able to find alternative strategies and getting out of the office. Of making appeals to the community, to solidarity. I think this is characteristic of us [Portuguese]. I did this to get around and get support and help for many families. I could not say "I cannot do anything for you". I would have not even sleep well at night, knowing that a family would be starving. Especially when children were involved [F.]

In her experience as a social worker, eligibility requirements did not affect people's movement across the country. From what she knew, beneficiaries easily transferred their file to another region when necessary and no one ever told her that they were prevented from crossing national borders, as long as they communicated their absence to social services, a rule well known by the beneficiaries. The main complaint she heard from unemployment beneficiaries was about the value of the benefit:

(...) the benefit is low. And the fact that is compulsory to look out for work, and to collect stamps [and signatures to prove that they are looking for employment]. But this has to be seen case by case, taking into consideration the area of residence, if the transportation available. People sometimes cannot run all the factories in the region to look for a job, but that does not mean they are not looking for a job [F.]

She explains that she understands the 'other side', that the idea is to encourage beneficiaries to look for a job. As she explains, benefits are transitory, as the objective is to support a person while seeking for a solution to the situation. She recognizes that the creation of rules demanding for an 'active' job seeking minimized the cases of persons that get "comfortable" and do not seek to change their unemployment situation. Nonetheless she recognizes that this is a difficult goal to achieve, especially for those who start looking for a job right away, if they happen to live in an area with few labour vacancies. It is still important to get around the inertia that unemployment can create:

because when people are not integrated in the labour market for a long time, it changes their habits. It changes their routines. It does not mean that people are lazy. Sometimes, it's the weight of being unemployed.... if you go to the café, you're criticized. If it was a worker, it's okay, but since the person is dependent on social assistance, they cannot go to the café. [F.]

Evaluating the system, F. recognizes that ten years ago

There were more [complaints]. But people now have become more knowledgeable about their rights. They know that they are entitled to the unemployment benefit, to SII [...]. Now, real complaints...even though they realize that there is a lot of bureaucracy involved and there may be delays, I do not see that there are more complaints than there was before. SII is always stressful, and always causes some discomfort [F.]

She refers to the case of individuals who sought to cheat the system. Indeed, despite having informed them that benefits had to stop once they started working, they continued to receive the allowance and were forced to repay the amount later on, when discovered. In those cases, F. explains, some persons felt outraged because, in their opinion, they did what they needed to do and that it's the problem of the social security which 'did not worked quickly enough'. She explained that she always said to beneficiaries that it could happen and they should not spend the money, but, some people insisted on using the money to pay bills, creating debts to social security that are afterwards they had to negotiate to be paid.

#### *EXPERIENCE OF CLAIMANTS*

A. (PT5.5.1.) is a 55-year-old women, living in a small coastal town of Portugal together with her husband, who retired due to a cardiovascular accident, and her older son. She worked for three years in a bakery, during the 90s, and had to leave due to tuberculosis that prevented her from working for a few years. After that, she worked for 15 years in three different codfish factories. She was dismissed from her first two jobs due to a collective redundancy following the 2008 economic crisis. Regarding her last job, she was dismissed at the end of her contract which was not renewed. Following the last dismissal, she applied for unemployment benefits:

I had the right to unemployment benefit during three years. Then it ended and I applied for the social unemployment benefit, that last for one year and a half and then another half year, because I am in a situation of long-time unemployment [A.]

For her, the experience with social assistance was not bad: 'To receive the benefit, I had to present a lot of documents but they were not hard to find. I always tried to do it quickly. I always gave the information they asked for, to not waste any time' [A.] A. had only finished primary school. During the time she received unemployment benefits, she attended two professional training courses to comply with associated conditions. The first one was a gardening course that lasted for six months and gave her the equivalent of the 6<sup>th</sup> grade of school. The second course was in elderly care. It lasted for one month and a half. She also had to present herself at the parish council every two weeks for them to access and confirm her unemployment status. If she had failed to comply with the two conditions – attending the training courses and present herself at the parish council – the benefits would have been cut. In her experience with social assistance, what was more challenging was her experience and time required to study again: 'I had to be there from 8 a.m. till 4 p.m. I did not have the time to do anything else. But I guess it was important to do it, and I am glad that I have now the 6<sup>th</sup> year of schooling. Even if it did not help me to find another job...' [A.]

A. does not receive cash benefits from social security since the benefit from long-time unemployment ended. She remains enrolled in the Unemployment Centre to be eligible to receive groceries from the food bank of the local Town Hall. To keep receiving this she sometimes needs to undergo mandatory one-day courses; since then she has worked as a housekeeper for a few hours a month, when required. Her attitude towards social assistance is somehow consistent with the idea that, to be deserving, benefit recipients should do something in return (Larsen, 2008 IN Buß, 2017).

S. (PT5.5.4.) started working at a very young age in the grocery store of her mother who passed away ten years ago. After that S. was able to keep the grocery store, as the owner. About two years ago a fire destroyed the store. She found out that she did not have the right to unemployment benefit, because during the two years prior to the time of unemployment she had not paid any taxes due to her low income. After the fire, and as a way to guarantee her survival and that of her children, she applied to the SII, which was granted to her for one year. S. experiences with social assistance was not difficult: 'It was very fast, but I had people helping me out throughout the process. I was not alone. If it were just for me, I would not receive anything. I'm a little bit proud, but look, we all have to eat. I had a lot of people helping me, and it was not hard at all. At least for me'.

In exchange for benefits several activities were proposed: 'I took a course. I have the 9<sup>th</sup> grade now, but initially I only had the 6<sup>th</sup> grade. I am now seriously thinking about taking classes to get the 12<sup>th</sup> grade diploma, as soon as things improve for me. She explained in great detail how important it became to have the 9<sup>th</sup> grade diploma: 'It was good for me. I was looking for work, and nobody wanted to give me a job'. During that period of unemployment, she did not feel that her time was affected, neither she felt useless. She attended classes while her own children were at school. During weekends, with the help of her friends, she managed to rebuild the grocery shop and it is now fully functioning. But she stressed how hard it was in the beginning:

At first I experienced a bit of hunger. My children went to the neighbours' to feed themselves, but not me, and I was hungry. It was hard. With the SII, it helped me a lot, but I could not do what I used to do. I was used to a big house, with a lot of things, and during that time I had to control myself [S.].

For S., the SII was very important, but she stresses the fundamental role the help of her neighbours and friends played, helping her during that time of crisis. This is a good example of social welfare system in Portugal (Santos, 1991).

T. (PT5.5.5.), a 40-year-old women is divorced with two children. She shares a similar experience with other interviewees: she started working at 15 years old and started paying taxes when she turned 18. Her first employment was in a private home, then in a supermarket, and in gas stations. Currently she is employed by a private cleaning company. It was between her job in a gas station and in the cleaning company that she became unemployed, for a period of a year and a half. Throughout that period, she received unemployment benefits. She has only studied until the 9<sup>th</sup> grade, and at the age of 32 she obtained the 12<sup>th</sup> grade diploma through the CECOIA (Vocational Training Centre for the

Commerce and Services<sup>8</sup>). As she underlines, she went through the course work to obtain the diploma because she had the dream of having the 12th grade; however, the course (administration) is not an area she would like to work on and she has not yet made use of it to find another job.

Similar to the other interviewees, T considers 'normal' her experience with social assistance, with the bureaucratic process required to obtain the unemployment benefit: 'I think it's something you always know that you need to turn out papers. We cannot only fill in name and address. Is normal, it takes times, and there are things that take longer. But for me, at least, it was a fast process'.

When asked about responsibilities in exchange for social assistance, T. explained that during the time she received the benefit she had to attain a Career Orientation Program [COP], which consisted of vocational courses. Also, she needed to prove she was actively looking for a job. This she managed by collecting signatures from the (potential) employers, as a proof that she was searching to be employed:

I did not feel bad, but I think that when you are doing a COP one should be exempt. It's hard to leave at 6.30pm, and later on, to go looking for a job. That part of the signatures, and identifying potential employers, was a bit...complicated. Even going to the job centre was a bit of an inconvenience, as we always had to miss part of the COP, even if only during a short period of time [T.]

Despite her comments about the lack of time to look for a job, and collecting the signature, T. considers that the demands of social security did not affect as she went to look for the signatures 'normally during working time'.

## **2. RELATIONSHIP BETWEEN SOCIAL SECURITY/SOCIAL PROTECTION, DESERVINGNESS AND JUSTICE**

### *EXPERIENCE OF SOCIAL WORKERS*

In F's opinion, there is no hierarchy of deservingness: 'It is a right that anyone deserves. There is no one who deserves more than another person [...]. Otherwise, there is no equality. We should all be able to receive support equally '[F.]

The same is stressed by C.:

Not at all. There cannot be differences. There are rules who clearly define who can have access to it and whoever loses if he/she does not comply with the rules. That is like that. I think that when someone becomes beneficiary of anything, his/her rights and duties

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<sup>8</sup> This training centre was created in 1986 through a "protocol signed by the Institute of Employment and Vocational Training (dependent from the Ministry of Solidarity, Employment and Social Security and responsible for the implementation of the national policies in terms of employment) and the Portuguese Confederation of Commerce and Services (the social partner representing the Commerce and Service sectors), as explained in the CECOIA official website, available at: <https://www.cecoa.pt/article/Q2kgfQoaMr.html>, assessed in February 2019.

should be very well explained. Everyone should have the minimum to live with some dignity, as this is unquestionable. [C.]

Also, for F., *belonging* is not important to deservingness: 'For me it is not relevant. It is not because of a religion, ethnicity, or by being from a very needy family that someone must have [more or less] priority '. The same position is defended by C. for whom belonging to a certain group is not important to deservingness. However, as she stressed:

today we continue to be born without having access to the same opportunities. The cradle in which one is born gives more or less opportunities. The weight of reality changes the conditions of each person and this way, I think that everyone should have...if we want in Portugal to exist under full rule of law, we must ensure that all who live in our country have the minimum [to live].

The only criterion of deservingness may be the situation of the claimant, and if there are children involved. For F., families with children that live with financial difficulties and whose parents cannot buy food for their children need to be helped first. Apart from that all individuals deserve to be helped equally.

#### *EXPERIENCE OF CLAIMANTS*

For A., only persons who had paid taxes for social security should have access to a public social safety net: 'There are person who receive the SII for many years, and they do not work. I received the unemployment benefits because I paid taxes. I did not steal anything from anyone' [A.]

The idea that SII beneficiaries are less deserving is a quite common (Ferreira, 2015). As stated previously, this is related to the idea that if someone has not contributed to social security, he/she should not receive aid or at least, not for such a long time. For A., belonging to a group is not relevant to deserving social assistance, the only important thing is to comply with the 'rules' established by social security.

S. shared her thoughts with us as an SII beneficiary: I know families that do not need anything, and still, they are receiving help, and other families that really in need and are not receiving anything at all. For me [the SII] was really helpful, and there are a lot of person in need who do not receive anything '[S.] For her, social security should have more control and look more specifically at each situation, analysing and following it in more detail. She is strongly against the 'formal' approach in which the social workers only 'do the maths' with the incomes of each family to see if they can receive some of the benefit. For her, the underserving person is the one who does not want to work:

I've heard many people saying (...) I'm not going to bother to work, just to be paid the minimum income [600€], I rather stay at home for that money '. These people are used to having [an income] without working. One strives to work, to have a little something and those people are behaving like this... getting used to it, to do nothing. There are some who deserve and some who not [S.]

S. think that to access social assistance, the support guaranteed by family and friends to claimants should be taken into consideration; the amount to be paid should 'depend on what a person earns, but also on family aid, and support from institutions. Maybe they should receive a little less'.

For T. defining a hierarchy of deservingness was not easy. She explains that at the moment of the divorce, she was unemployed and went to live with her parents (to avoid paying a rent). Right then she became 'undeserving' of social assistance in the eyes of the social worker in charge of her case:

I think it's wrong. It is not my parents who have to raise my children. For a year or so it was my parents who supported my children. It was not with 150€ that I received that I would support them. Sometimes [social workers] help those who do not deserve it. [T.]

In T's opinion, the solution to the problem of how to identify who really deserves support should rely on a stronger control. She also thinks that claimants should only ask for help if they really need it and have greater recognition that some people deserve more help than others. T. confesses that, although her income is below 200€, she stopped asking for more aid from the social security because they always refused it. She explains that, although she is entitled to receive a meal per day from the social cafeteria (usually dinner), she still needs to provide lunch to her daughter twice a week, when she does not eat at school. When T. asked for more support, the answer from the social worker was that she did not need anything more, since she already had the right to one meal per day, but that she could bring the paperwork to make the claim. T. says that she was so angry with the situation that she left: 'There are people who should not be on the that side [as social workers], they are "cold". Some people do not deserve help, it's true. And that's why I say they should look carefully to each case' [T.]

### **3. MOBILIZATION OF JUSTICE IN WELFARE STRUGGLES**

#### *EXPERIENCE OF SOCIAL WORKERS*

According to the working experience of F. and C., children and elderly are the groups most vulnerable to injustice. These two groups are sometimes affected by the context and with whom they live. For her, children of unemployed parents can have their life affected in a way that the social security system cannot help because sometimes the parents' income is slightly higher than the value defined to support a family. C. also underlined that vulnerability is mainly created by the life story of each individual, and that some persons tend to replicate the history of their family while others change their way of living dramatically. Therefore, vulnerability is created by the context in which one is born.

Evaluating the everyday struggles of those on social assistance, F. explains that there is a rather diverse range of experiences; sometimes what is fair for one person may not be fair to another. For C., there are persons who are always unsatisfied, and who feel wronged. In her experience, those who think that benefits are fair are the people who use the period of unemployment to change their way of life; for these persons benefits help to maintain their "family working"<sup>9</sup> [C.] and to keep hope, as without the benefit they could not survive. She explains, based upon her experience, that individuals

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<sup>9</sup> 'Family working' as in being able to provide basic living conditions for the household. This include food, clothing, housing, education, and medical care.

who receive benefits for a long period of time, do not think about justice or injustice. 'It's a right, it's not a question of justice, or not. It's a right' [C.].

For F. the key recommendations to achieve a just welfare state are:

retirement benefits. I think they are extremely low, and do not bring quality of life to anyone. And family benefits [for each child] needs to be attributed without distinction. All children should receive it. Maybe not the upper class, for the rest it should be the same for everyone [F.].

In C.'s opinion,

There should be a maximum value for retirement benefits. I do not agree with the politicians' benefits<sup>10</sup>, for example. There should be a ceiling, because it is the state which is paying for it. If we want a country with a good level of well-being, wealth has to be better distributed. It starts there, with the politicians that produce the laws. [C.]

For her, the key problem that impedes the achievement of a more just welfare state is the low level of 'citizenship'. 'We still have a lot people running away from taxes, avoiding paying them, and therefore not all revenues are collected. We have people who work and do not pay tax'. In C.'s opinion, people should learn from an early age that when they pay taxes they are working towards a common good, contributing to society.

When asked about possible recommendations, F. laughs:

If we had [in Portugal], a lot of money, we would not need social assistance. Above all, it is necessary that people live with equality and that should be the same for all, no one should live with deprivation or in situation of blunt injustice. People need to have money for the basics, to own their things, to go out, to have breakfast in a café if they want, without feeling judged. But I do not know [laughs] [F.]

C. on the other side, states that she does not believe in an ideal world:

Ideal worlds are worlds that believe that people do not have to suffer. I do not believe in it, it's in hard situations that we learn. But there could be a world where wealth would be better distributed [...], where difference is accepted, and rules adapted to different situations. Where the common good would be the key, above anything else.

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<sup>10</sup> The interviewee refers to recent news showing that due to a 1986 law, Portuguese politicians could receive retirements benefits related to their work as politicians in addition to other occupations they previously had. Since the retirement benefits of politicians are already higher than the average this would lead to exorbitant levels compared to the average benefits in Portugal.

## *EXPERIENCE OF CLAIMANTS*

A. identified two unjust situations regarding social assistance in Portugal. The first one is the lack of control, in her opinion, over persons receiving SII:

Those people [who receive SII], do not work, they do not pay taxes [to social security]. When they reach retirement age, those who have not paid should not receive anything. But they will receive anyway. The social security grants them retirement benefits, and these benefits have to come from somewhere, to be taken from someone else" [A.]

Regarding recommendations, A. considers that lower unemployment benefits and other cash benefits should be increased; however, she is strongly against the rise of the higher benefits: 'Only those who receive low benefits should have an increment. Not those who receive 1000€. There is no justice in social security in Portugal '[A.] By '1000€ benefits', A. is referring to retirement pensions and not unemployment benefits. Either way, in her opinion, there is an imbalance in the benefits given to those who had previously worked in low paid jobs in contrast to those who had worked in high paid jobs. Struggles for justice in this context are more related to redistribution since for her, those who are poor keep getting poorer.

S. shared with us her thoughts regarding the Portuguese welfare state:

Can I be straightforward? I think the current situation reveals a series of unfair situations, really unfair. I am going to say something I should probably not say. Roma are paid by social security. I see things near my house, realities that social workers should look at. Roma who do not deserve anything receives 'high' benefits, whereas for some people the minimum income is enough. For me it was great [to receive the SII], and it was not the minimum wage, it was about 100€. I bought lots of yogurt and meat for my children, but there are some people who now receive nothing and others who receive a lot [S.]

The recommendation of S. to make the welfare state more just, is to transform the system and make it more controlling

Be more attentive to people who do not need assistance. And they should not give so much to those who do not deserve it, such as Roma and people who do not work. I always paid taxes, only during two years I was exempted, and because of that they did not give it to me [unemployment benefit]. They should look back; to what we have already given to society. [S.]

S. explains that there are situations that are ignored, people she knows who do not have the means to feed their children and who do not benefit from social assistance. She also underscores that financial aid is just one of the forms of support that people need. Because of her experience at the grocery store she 'sees a lot of things', and tries to help with what she can in the same way others have helped her.

T. is very categorical in her answer to the question about whether the welfare state in Portugal is fair:

No. [laughs nervously]. In some situation it is not. It's complicated. I already came here [to social security office] to ask for help and I was helped. I cannot say it was bad. When



my daughter was sick, it was here that I came for help. The social worker who talked with me, helped me. Now that I need help again, the answer is different. But the social workers are quite different too. The state should be more careful with the people they hire to work as social workers [T.]

T. recommends that social workers should be trained to know more about the context they are working in, to know and understand better the reality lived and experienced by the claimants. This, according to T., would help to check if the beneficiaries deserve help or not, if they are entitled to the benefits awarded. She also thinks that the welfare state can only be more fair if the social workers have good moral values and are sensitive to each experienced situation, which they cannot grasp deeply just through documents. For T. some claimants are rather selfish. The individualism and the greed revealed by several people is made explicit when they do not communicate to the social security when they no longer need help.

## CONCLUSION

Deservingness and the welfare state are intertwined, even when it seems hard to make a link between them. As the interviewees discussed, some think that there are some persons who deserve more than others. Following the five criteria presented by Wim van Oorschot (2000) regarding deservingness, one can say that the interviewee considers that need (criterion 2 in Oorschot, 2000: 36) is one of the more important criteria of deservingness. The claimants interviewed seem particularly keen to consider this an important criterion, probably due to their consciousness of how much someone can need help in a precarious situation of unemployment and also due to their experience with social assistance and injustices associated (for example, T. who did not have the right to more aid because she already was receiving one meal per day). For all the interviewees, the fifth criterion presented by Oorschot (2000), reciprocity, is the most important and was always implicit in their discourses. For them, somehow, those who contribute to society, by paying taxes, or community work, deserve social assistance because they 'give back' something to society to justify the help given. This also explains why the SII is so unpopular, since it can be allocated independently of individuals' previous contribution for the system. Therefore, their reciprocity is not as obvious as it is for those benefits which are only available to those who have contributed to social security during the months prior to unemployment (see page 9).

Looking at the specific cases of the claimants interviewed, one could feel tempted to say that the retrenchment of the welfare state in Portugal during the crisis did not affect beneficiaries of social assistance. However, as F. explained, it was a period when, once more, the welfare society (Santos, 1995) was of extreme importance. Both informal networks of relationship (families, friends) and institutions of solidarity (see Brito, 2018) protected vulnerable groups (unemployed individuals and their families, children, elderly) in a way that meant that the cuts in social assistance were less felt. In a sense, there is always this idea on the background that if social security and aid given by the state fails or is not enough, there will always be friends, family and third sector institutions to give an extra hand in times of crisis. Nonetheless, this does not mean that claimants do not feel wronged when the welfare state fails to help them, as T. explained. Also, prejudice against Roma as allegedly being dependent on subsidies creates a feeling of injustice among claimants, although most of the time this

are based on wrong information and years of racism institutionalized against this group (Araújo & Brito, 2018). Cohen (2002 IN Ferreira, 2015), explains that cuts in welfare state ‘have been accompanied by social distrust. Common sense – the idea that the majority of persons benefiting from SII do it in a dishonest way – gains credibility’ (Ferreira, 2015: 154), which justifies the feeling that the beneficiary of social assistance needs to contribute to society somehow and needs to be controlled to ensure their ‘willingness to get back to work’ (Dubois, 2008) which can also be understood as a criterion of deservingness (Oorschot, 2000).

During the financial crisis, enabling social, redistributive (and others forms) of justice was not the first objective of the European Commission, the World Bank and the IMF. For these three institutions which had such an impact on Portugal and others European countries and on the discourses associated with saving the European economy, what was important was ‘more-selective targeting of benefits at needy groups or those in “real need”’ (Oorschot & Roosma, 2017) – although who were those ‘in real need’ was never fully explained. Nonetheless, cooperation is one of the basic survival strategies of human evolutionary history and is well documented. One knows that engagement in mutual help implies a risk of being exploited by cheaters (Hansen, 2019: 415) and criteria of deservingness exist to solve this problem, leading individuals to identify cues that signal whether others are genuinely unlucky or lazy citizens who do not deserve help (Feldman & Steenbergen, 2001: 660). This significantly changes the debate about deservingness, but a profound analysis on this topic is still needed to understand how the crisis impacted the criteria of deservingness, especially in Portugal where the welfare state is almost inexistent and backed up by a strong welfare society. Knowing within a society who it is that citizens consider (un)deserving allows us to understand, create and renew ties of solidarity and citizenship between generations and social groups (Oorschot, 2000: 44) that ultimately promotes more equity and social justice between individuals.

### National policy recommendations

Based on the interview analysis and the existing literature, and in keeping with one of the objectives of the ETHOS project – inform policymakers – here follow some policy recommendations targeted toward the Portuguese national context:

- Promote a better coordination between social security and civil society, to take care of claimants who fall off the system due to their incomes;
- Introduce in the analysis of each claimant’s case their social, geographical and familiar context to identify possible aids from IPSS;
- Promote the professional and social (re)integration of claimants through community work;
- Recognize the importance of the IPSS as a back-up of social security and increase financial support for those institutions;
- Simplify the process of seeking employment in cases where claimants are studying;
- Educate the public on the types of benefits and the rights and duties associated to them, to deconstruct prejudices against benefit claimants;

- Promote professional courses suitable to each claimant profile and to the labour market of their area of residence.

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## **ANNEX - LIST OF INTERVIEWS**

PT5.5.1. Woman, 57 years old, unemployed [named as A. in the text]

PT5.5.2. Woman, 45 years old, social worker [named as F. in the text]

PT5.5.3. Woman, 55 years old, social worker [named as S. C. in the text]

PT5.5.4. Woman, 40 years old, ex-beneficiary of Social Insertion Income, currently self-employed [named as S. in the text]

PT5.5.5. Woman, 40 years old, ex-beneficiary of unemployment benefit, currently employed in part-time [named as T. in the text]