

OECD-SOCR metadata on income replacement programmes - Portugal

INTRODUCTION.....	2
OLD AGE.....	3
Pensions	3
Early (Anticipated) retirement	3
SURVIVORS	4
Survivor Pensions	4
INCAPACITY	5
Disability Pensions	5
Pensions (Occupational injury and Disease).....	5
Paid Sick Leave	6
FAMILY.....	7
Maternity and Parental Leave	7
UNEMPLOYMENT.....	8
Unemployment Compensations	8
Early retirement for labour market reasons.....	8
OTHER SOCIAL	9
Income Maintenance.....	9
HOUSING	10
Housing Benefits.....	10

Last Update: March 2021

Contact: social.contact@oecd.org

INTRODUCTION

This note includes a comprehensive list of the social programmes included in the SOCR database, accessible via OECD.Stat [<http://stats.oecd.org/Index.aspx?DataSetCode=SOCR>].

Based on information collected in five rounds of the SOCR questionnaire, the database distinguishes between priority and optional programmes. Priority programmes have the following characteristics:

- They are main income replacement benefits, meaning they are not supplements but are typically received in their own right, independently of other benefits; and
- Their volume is significant or highly variable:
 - programmes with a significant number of recipients or expenditure (regardless whether open to new recipients or not); or
 - programmes open to new recipients that are highly sensitive to economic or social conditions.

All other programmes are considered as optional. For instance, very small programmes that are being phased out, as are benefit “top-ups” of unemployment benefits or pensions.

Priority programmes are made publicly available through OECD.Stat, optional programmes are not published. Programmes are organised by social protection branch (e.g. ‘OLD AGE’) and sub-branch (e.g. ‘Pensions’) under the form of programme tables. The aim of them is to include essential information needed by users to identify the benefit and to know methodological details that may be relevant for a correct interpretation of recipients figures.

Data sources of local administrations. Web links to official administrative databases and reports are provided when the sources are publicly available. These web pages are subject to changes by local administrations, which implies that in the future some links may not work.

Other OECD sources of qualitative information on social benefits: [Country policy descriptions](#).

Other OECD sources of information on social protection: [Social Expenditure \(SOCX\)](#), [Tax-Benefit model \(TaxBEN\)](#), [Family database](#), [Pensions at a Glance](#).

OLD AGE

Pensions

3 programmes reported

Programme Name [English]	Old Age Pension
Programme Name [Original]	Pensão de Velhice do Regime Geral
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Pensions for civil servants not included.
Source	Social Security, statistics

Programme Name [English]	Social Old Age Pension
Programme Name [Original]	Pensão Social de Velhice
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Social Security, statistics

Programme Name [English]	Solidarity old-age supplement (CSI)
Programme Name [Original]	Complemento Solidario per Idosos
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Social Security, statistics

Early (Anticipated) retirement

1 programme reported

Programme Name [English]	Anticipated old-age pension
Programme Name [Original]	Pensão Antecipada por Flexibilização
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Gabinete de Estratégia e Planeamento (GEP), administrative data

SURVIVORS

Survivor Pensions

2 programmes reported

Programme Name [English]	Survivor Pension
Programme Name [Original]	Pensão de Sobrevivência
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Includes beneficiaries of Widow and Orphan pension (earning-related).
Source	Gabinete de Estratégia e Planeamento (GEP), administrative data

Programme Name [English]	Widow Assistance
Programme Name [Original]	Pensão de Viuvez
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Non-earning related scheme
Source	Gabinete de Estratégia e Planeamento (GEP), administrative data

INCAPACITY

Disability Pensions

3 programmes reported

Programme Name [English]	Disability Pension
Programme Name [Original]	Pensão de Invalidez
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Gabinete de Estratégia e Planeamento (GEP), administrative data

Programme Name [English]	Disability Social Pension
Programme Name [Original]	Pensão Social de Invalidez
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Phased out in 2018 and replaced by Social Benefit for Inclusion
Source	Gabinete de Estratégia e Planeamento (GEP), administrative data

Programme Name [English]	Social Benefit for Inclusion
Programme Name [Original]	Prestação Social para a Inclusão
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Introduced in October 2017 and replaced Disability Social Pension
Source	Gabinete de Estratégia e Planeamento (GEP), statistics

Pensions (Occupational injury and Disease)

1 programme reported

Programme Name [English]	Subsidy for Absolute Permanent Incapacity for Work
Programme Name [Original]	Invalidez Absoluta
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Gabinete de Estratégia e Planeamento (GEP), administrative data

Paid Sick Leave

1 programme reported

Programme Name [English]	Paid sick leave
Programme Name [Original]	Subsídio de Doença
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Social Security Agency, statistics

FAMILY

Maternity and Parental Leave

1 programme reported

Programme Name [English]	Parental Benefits
Programme Name [Original]	Subsídio de Parentalidade
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Started in second quarter of 2009 and replaced maternity and paternity benefits.
Source	Social Security Agency, statistics

UNEMPLOYMENT

Unemployment Compensations

2 programmes reported

Programme Name [English]	Unemployment benefit
Programme Name [Original]	Subsídio de desemprego
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Social Security Agency, statistics

Programme Name [English]	Unemployment Assistance
Programme Name [Original]	Subsídio social de desemprego (subsídio inicial, subsequente)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Social Security Agency, statistics

Early retirement for labour market reasons

1 programme reported

Programme Name [English]	Early retirement benefit for labour market reasons
Programme Name [Original]	Reforma antecipada por motivos de mercado de trabalho (DLD)
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Gabinete de Estratégia e Planeamento (GEP), administrative data

OTHER SOCIAL

Income Maintenance

1 programme reported

Programme Name [English]	Social Integration Income - Guaranteed minimal income
Programme Name [Original]	Rendimento social de inserção
Means-tested	Yes
Reporting unit for annual caseloads	Recipient households, average or point-in-time
Other remarks	
Source	Social Security Agency, statistics

HOUSING

Housing Benefits

1 programme reported

Programme Name [English]	Rent benefit
Programme Name [Original]	Subsídio de lar - Subsídio de renda
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Gabinete de Estratégia e Planeamento (GEP), statistics