Chapter 29

Portugal

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Abstract This chapter addresses the topic of extended working life from a gender-sensitive perspective, through a discussion of employment and working patterns, care arrangements, health issues, the pension system, employment policies and other relevant public policies in Portugal. Concerning employment patterns, Portugal is similar to the ‘Nordic universal breadwinner model’, as both women and men tend to work on a full-time and continuous basis throughout their lifecourse. From 2002 onwards, the legislated pensionable age has been rising and early retirement was increasingly penalised until the mid-2010s. Active labour market policies, such as the transition to more flexible forms of work, the possibility to accumulate pensions and wages, incentives to the hiring of older workers, or promotion of lifelong learning are examples of current policies, although they seem to have been insufficient or largely ineffective so far. In Portugal, as elsewhere in Europe, women live longer than men but have higher rates of morbidity and functional limitations in old age. This implies that it is more difficult for women, on average, to keep working until a later age. Equity in promoting good health is explicitly assumed as an objective of national health programmes.

Keywords Gender · Work · Care · Extended working life policies · Portugal

Introduction

This chapter addresses the topic of extended working life from a gender perspective, through a discussion of employment and working patterns, care arrangements, health

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issues, the pension system, employment policies and other relevant public policies enacted in Portugal, where a comprehensive extended working life strategy has not been fully developed yet. However, for the first time a National Strategy for Equality and Non-Discrimination (2018–2030) is in place, with a specific policy focus on intersectionality and on the strategic needs of older women.

Gender and Employment

In 2017, women (aged between 15 and 64 years) in Portugal had a relatively high employment rate (64.8%), slightly above the European average (62.4%), with the country as whole having a gender employment gap of 6.3 percentage points (the employment rate for men was 71.1%) (Eurostat 2018). Portugal is close to the ‘Nordic universal breadwinner model’, as both women and men tend to work on a full-time and continuous basis throughout their lifecourse (Casaca and Damião 2011; Wall 2007). In fact, 88.3% of all Portuguese women in employment (aged between 15 and 64 years) work on a full-time basis in the labour market. For women working part-time, the main reason given is the difficulty in finding a full-time job, suggesting that part-time work is mostly involuntary. Moreover, the country has the second highest employment rate (81.2%) for women (aged between 20 and 49 years) with small children (less than six years) in the EU, immediately after Sweden (81.6%) and well above the EU28 average (63.4%). Furthermore, contrary to the dominant pattern of career interruption after childbirth among women in the EU, the employment rate in Portugal is slightly higher for women with small children (81.2%) than for those women without children (78%) (Eurostat 2018).

In addition to low wages and the need to meet the economic needs of the household, other factors may account for the trend towards women increasingly taking part in the labour market, such as the development of the public administration sector after the mid-1970s, the higher level of women’s formal education and the effects of a family socialisation process based on a dual breadwinner model. Other historical reasons also explain such a tradition of a high women’s participation in the economic activity of the country, particularly the recruitment of very large contingents of men in the colonial war and emigration flows in the 1960s, leaving space for women’s employment, along with the need to contribute to family incomes in a context of extensive deprivation and high levels of poverty (Ferreira 1993; Casaca and Bould 2012; Addabbo et al. 2015; Casaca and Perista 2017).

Despite the aforementioned continuity and intensity in patterns of women’s participation in the labour market, women nevertheless tend to be concentrated in the lowest paid and most precarious jobs in the economy (Casaca and Bould 2012). Moreover, the gender pay gap remains high, with women still earning 15.8% less in basic wages and 19.1% less in total earnings less than men in 2016 (GEP/MTSSS 2016). Such patterns of enduring low wages for the entire career of women in part explains the gender gap in pensions—31.2% in 2016 (European Commission 2018).

People aged 55 and above in 2017 represent 21.6% of all employees in the country, with older women less represented than men (45% and 55%, respectively) (GEP/MTSSS 2017). From a longitudinal perspective, data provided by Eurostat (Labour Force Surveys 2000–2017) for employed people aged 50 years and above, show that the employment rate for Portuguese women over the last 17 years has increased 8.2 percentage points, but only 0.8 percentage points for men. Between 2000 and 2017, employment rates among people aged between 55 and 64 years old increased from 42 to 50.2% for women and from 62.2 to 63% for men (Eurostat 2018). Such an increase in the employment rate among older women poses key policy and social challenges. In later life, women provide essential care for ageing parents as well as grandchildren. Despite progressive legislation on gender equality and (paid) work-family reconciliation, the obstacles to *defamilialisation* are high, in particular due to the lack of childcare and eldercare facilities (Casaca and Bould 2012), coexisting with a strong asymmetry in terms of the burden of unpaid and caring work (activities that are still largely undertaken by women) (Perista et al. 2016). Persistent inequalities in terms of access to employment, quality jobs, pay conditions, reconciliation between paid work and family responsibilities are just some of the structural vectors of gender inequality, thereby tending to negatively affect women and their participation in the labour market (Albuquerque and Passos 2010; Ferreira and Monteiro 2015; Ribeiro et al. 2015; Perista et al. 2016).

The system of ‘parenthood protection’, implemented in 2009, strengthens fathers’ rights and provides the incentive for parents to share initial parental leave. Such measures were designed to promote equality between women and men in combining paid work and family life. Parents are entitled to an initial parental leave of 120 fully paid or 150 calendar days (paid at 80%). It is mandatory for the mother to take six weeks after the birth and for the father to take 15 days; the remaining period may be divided between parents by mutual agreement. An extra 30 days (‘sharing bonus’) is available if both parents share the leave. The percentage of fathers sharing the initial leave for one month has increased from 8.6%, in 2009, to 35.8% in 2018 (CITE 2019).

According to data provided by the Eurobarometer, only 14% of Portuguese citizens reported having personally experienced or witnessed age discrimination in the workplace. However, 84% reported that older people (55 and over) are more likely to be excluded from training in the workplace (European Commission 2012). Other studies have also demonstrated that training and upskilling opportunities are more limited for older workers (Ferreira 2015). As reported by Casaca and Perista (2017), the Eurobarometer data also show that only half of Portuguese respondents (52%) report that workplaces are age-friendly, meaning that they are adaptable to the needs of older people (European Commission 2012). In an intensive study on corporate practices regarding older workers, focusing on three national companies, Barroca and colleagues (2014) note that the idea of integrating an older workforce is acknowledged in these companies; however this recognition has not been translated into a coherent strategy or intervention. A few good practices include programmes of mentoring or other similar programmes aim to transfer the accumulated organisational culture and experience of older workers to younger colleagues. Only one

company in the study reported programmes of mobility for older workers, essentially associated with their lifecourse and the need to perform different functions due to health reasons. Based on data collected by the Eurofound, Ferreira (2015) refers to two private companies with good practices involving training and skills development of older workers. A local municipality and a non-profit association also reported good practices in terms of the support provided to older workers in their transition to retirement.

Despite the relevance of the topic of extended work from a gender perspective, and apart from a few exceptions, the literature and the available information sources have not followed a gender-sensitive approach.

Pension System and Extended Working Life Pension Policies

The Portuguese welfare system, as in other Southern European countries, is a relatively recent development. It was established by the Democratic Constitution of 1976, already in the broader context of the reversal of some social rights that was taking place in many Western countries, pressured by the rising ‘neoliberal turn’. According to the Constitution of 1976 (Article 63), ‘all citizens are entitled to Social Security’ and ‘the Social Security system protects the citizens in the eventuality of sickness, old-age, disability, widowhood, orphanhood, as well as in unemployment and in every other situation where subsistence means or work abilities have diminished’.

The social security system therefore has universalistic principles in terms of coverage. However national pension arrangements are predominantly composed of the first pillar and organised on the basis of contributions and following a pay-as-you-go model (Albuquerque et al. 2010; Fernandes 2014), bringing it closer to the Bismarckian model, i.e. with a primary focus on those in stable employment. Pensions are divided into three main schemes—the general, the special regime for public servants and the non-contributory scheme. While the first two are mostly self-financed by the contributions of workers (employees, self-employed and public servants) and employers (either private companies or Public/State companies and organisations), the non-contributory scheme (‘social pensions’) is financed by general taxes (through State budget transfers) within the principle of redistribution.

Early retirement was favoured over extended working life policies until the beginning of the 2000s. Extended working life policies entered the national agenda from 2002 onwards, influenced by European Strategies and frameworks (Employment Strategy; Lisbon Strategy). Three major trends were identified in the light of pension reforms in this century: (1) the extension of the legislated pensionable age (including making it more difficult to retire through disability routes); (2) financial incentives to promote later retirement, through the introduction of full or partial actuarial adjustments, so that working longer is compensated by benefit supplements and retiring earlier is discouraged by benefit reductions; and (3) the extension of contribution periods necessary to qualify for a full pension and the use of lifetime earnings for the

calculation of benefits, instead of the average salary of the last (usually best) years (thus typically lowering values of pensions).

As a consequence, early retirement has been increasingly penalised since the mid-2010s. During this period, a sustainability factor was included in the formula applied to the calculation of early retirement pensions, which takes into account average life expectancy. As a consequence, in 2019 those applying for early retirement can expect to have their pensions permanently reduced by 14.8%. The legislated pensionable age has also been steadily increasing, standing at 66 years and 4 months in 2018 and at 66 years and 5 months in 2019. In the last few years, a slight easing of the rules for acceding early retirement was decided and implemented in phases, although the actual coverage of these changes is still unclear. In any case, it is possible to draw a pension and earn money.

Portugal is among the fastest ageing countries in the world, with low fertility rates and, in the recent past, soaring emigration rates of youth who left the country in response to the deep economic crisis precipitated by the global meltdown of 2008 and the austerity policies that followed, particularly after 2011 (Rodrigues et al. 2016; Rodrigues 2018). Population ageing has gained increasing academic, political and social attention. The European Strategies for Employment, later embraced by Europe 2020 and the advancement of national policy reforms applying principles of working life extension have set the background for several national studies.

These studies have covered the frequently overlapping issues of pension schemes, welfare arrangements and the challenges of ageing to the sustainability of Social Security (Mendes 2011; Albuquerque 2016); activation and employability of older workers (Capucha 2014; José and Teixeira 2014; José et al. 2017); the problem of ageism and organisational practices (Barroca et al. 2014); gender inequalities (Casaca and Bould 2012; Perista and Perista 2012; Ferreira and Monteiro 2015; Wall and Aboim 2015; Perista et al. 2016); health and/or quality of life (or wellbeing) (Fernandes et al. 2012; Alcântara da Silva 2014); and the reconciliation of working life and family care work, also among caregivers (Perista et al. 2016).

Extended Working Life Employment Policies

Equality and non-discrimination on the grounds of gender and age (among other grounds) are enshrined in the Portuguese Constitutional Law as well as in the Labour Code. Older citizens who seek advice about their rights especially regarding health, social security, housing, equipment and services, may access the Senior Citizen's Line, a toll-free telephone number, run by the Ombudsperson office.

Active labour market policies, such as transitions into more flexible forms of work, the possibility to accumulate pensions and wages for those who work beyond the statutory age, incentives to the hiring of older workers and the promotion of lifelong learning are examples of policies pursued since 1999, although so far they seem to have been insufficient or largely ineffective in Portugal. As regards access to training over the lifecourse, the percentage of the Portuguese population aged 50–74 years

that is involved in education and training activities is very low, barely above one%; furthermore women are less likely to have undergone training over their working lives that is paid for or provided by their employer (24% of women and 32% of men) (Perista and Perista 2012).

Contrary to the typical decline in job insecurity among older employees on average in the EU28, especially after age group 45–54 years, job insecurity is reported to be higher for older age groups in Portugal (as well as in some other countries) (Eurofound 2017). Workers in physically-demanding jobs are entitled to specific provisions regarding early retirement. However, the dominant policy approach, following the approval of the new Basic Social Security Law in 2007, is to encourage the postponement of retirement by increasing the financial penalty for early retirement and granting bonuses for those who delay their retirement. There is no mandatory retirement age in the private sector in Portugal. A debate recently emerged about the removal of the upper age limit to work in public administration (set at 70 years old).

National research has confirmed that, in a lifecourse perspective, gender is found to be a strong predictor of mid/later lifecourses, both in family and work trajectories (Wall and Aboim 2015). Nevertheless, in general, policies and incentives to extend working life have been gender blind and have ignored the respective gendered implications of being retained in the labour market (Casaca and Bould 2012). The urgent need for formal care provision has been largely disregarded by policy debates and reforms. The lack of attention to this issue is particularly critical in countries like Portugal where such provision remains rather low, particularly for older people and other adult people in need of care. Moreover, recent austerity reforms have imposed further cuts and restrictions in welfare provisions, in a context where people (women in particular) live longer but are often in need of care (Casaca and Perista 2017). However, for the first time, a National Strategy for Equality and Non-Discrimination (2018–2030) is in place, with a specific policy focus on intersectionality and on the strategic needs of older women. The Action Plan for Equality between Women and Men, which is one of the core policy documents included in Strategy, has incorporated measures geared towards older women's empowerment through literacy programmes and training in information and communication technologies, in addition to measures to protect them against domestic and gender-based violence (Governo de Portugal 2018).

Health and Care

Broader inequalities based on gender and socioeconomic status translate into health inequalities. Women face worse socioeconomic conditions and are more prone to suffer from higher morbidity risks than men, as well as to perceive worse subjective health, despite the higher frequency of healthy practices. Women also have more obesity problems than men. In contrast, men aged 50 years and above tend to have a better health status at the same ages as women, even though they more frequently accumulate risk factors (alcohol consumption, smoking) and thus suffer a higher

probability of premature death (Fernandes et al. 2012). Women use health services more, which may be due to their poorer health, but also from self-awareness of health problems, which may protect them against early death (Perelman et al. 2012). However, more than gender, lifecourse events and institutional contexts (work, retirement, family, leisure) seem to influence how people experience health and illness and how they age (Fernandes et al. 2012).

Sociodemographic characteristics are related to part of the self-reported health variance: women, older, less educated and poorer individuals report experiencing worse health. These determinants lose some of their predictive characteristics when social activities are included in analyses. As expected, physical constraints or chronic illnesses are the most important set of factors affecting self-reported health, but demographic variables, the size of the social network and the involvement in social and individual activities are also significant (Alcântara da Silva 2014).

Regarding health in the workplace, occupational accidents tend to disproportionately affect men due to gender imbalances in economic sectors where injuries are more frequent (*e.g.* manufacturing industries, construction, wholesale and retail trade and repair of motor vehicles/cycles) (Lacomblez et al. 2014). Occupational illnesses, however, seem to unevenly affect women. In 2013, according to Eurostat, 5.5% of women and 3.5% of men reported a work-related health problem. There is also a gender effect in the probability of suffering from moderate and severe functional limitations in the 50 + Portuguese population: 7.1% for women and 5.2% for men. The difference between men and women increases particularly after the age of 65 years (Serrano-Alarcón and Perelman 2017). Because women begin to experience functional limitations at an earlier age than men, it may be more difficult for them to work until a later retirement age. Additionally, pension reforms have increased restrictions on access to disability pensions, which makes them less of an alternative for women, despite their higher levels of disability.

Portugal had a National Programme for the Health of Older People (DGS 2006), for the period 2006–2010, which explicitly recognised gender as a determinant of health, although the idea was not clearly reflected in a proposal of action. During the same period, the European Institute of Women's Health produced a report about the discrimination of women and girls in the health sector, for which Portugal contributed. It stated that women's health in Portugal appeared to be strictly related to sexual and reproductive health issues.

In 2015, Portugal had the highest rate of informal home care in Europe, as well as the lowest rate of non-home-based care and one of the lowest coverage rates of formal care (ERS 2015). The limited availability of affordable formal long-term care particularly affects women. On the one hand, they tend to experience more functional limitations, and are therefore more dependent on care, and on the other and, they are the main caregivers.

According to the latest edition of the National Health Survey, in 2014, around one million people aged 15 years or more (*i.e.* 12.5%), provided informal care or assistance to relatives or other non-family members (INE 2016). Studies have pointed out that without informal caregivers, around 80% of elderly and dependent people could be institutionalised. The work informal caregivers perform is estimated to

represent almost €4 billion per year (Teixeira et al. 2017), which is an amount similar to approximately two per cent of the Portuguese Gross Domestic Product.

In recent years there has been growing concern about the need to develop support measures for informal caregivers. In mid-2016, various parliamentary groups issued and adopted Parliamentary Resolutions recommending support measures in favour of informal caregivers and/or the creation of a new status for them. In January 2018, a working group created to study the establishment of a new status for informal caregivers delivered its report to the Parliament's Commission for Labour and Social Security. The report summarises much of the discussion on the subject and identifies two overall aspects to take into consideration, i.e. that measures should take into account the wish and availability of the person to become an informal caregiver, and that these measures should be irrespective of the age of the care recipient. Based on these overall aspects, it draws up a set of recommendations for supporting caregivers. These comprise: (1) a support plan including respite and training; (2) leave and social benefits and/or financial support compensating for possible income loss; and (3) the reconciliation of care with professional life. In March 2018, following discussion of the report, Parliament scheduled a joint discussion of five documents: a petition, two draft Parliamentary resolutions and two draft laws. Representatives of informal caregivers have been pressing the government to include mechanisms of protection of their activity in the State Budget for 2019, but the demand has so far not been addressed.

Conclusion

The key stakeholders in the country have not integrated a gender-sensitive approach in public policy regarding extended working life. In addition to the scarce academic literature on the topic, in general the debate has not gathered the attention of media and it has been largely absent from the agenda of social partners. The policy debate has been driven by concerns about cutting costs, namely with regard to pensions, healthcare and social protection systems as well as increasing the labour supply and promoting economic growth.

Furthermore, a comprehensive extended working life strategy has never been fully developed. Policies have been designed in a fragmented and ad hoc way and the concern over retaining older workers in the labour market tends to be gender-blind, ignoring the fact that gender roles in paid work and unpaid care work are not equal and that women tend to exhibit functional limitations earlier in life, all combining to create more difficult old-age support conditions for women.

Despite the relevance of the topic from a gender perspective, and apart from a few exceptions, the literature and the available information sources have not followed a gender-sensitive approach.

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