

# UNMET NEEDS IN PORTUGAL

## TRADITION AND EMERGING TRENDS

An indepth study on the unmet needs in Portugal was conducted by Tecnologia, Educação, Saúde e Engenharia (TESE) with Dinamia-CET from the Lisbon University Institute from 2008 to 2010. **Helena Gata** and **Sara Almeida** offer us the first English translation on its findings and update us on the programmes created in response to the needs and vulnerable groups identified.



In TESE since 2006, **Helena Gata** is currently the national area director. She has extensive experience in managing and coordinating projects, in education and health areas. Helena has a degree in Sociology, a Master's degree in Development and International Cooperation and she participated in INSEAD Social Entrepreneurship Programme, INSEAD (Singapore). (email: h.gata@tese.org.pt)



In TESE since 2007, **Sara Almeida** is currently Project Coordinator of ORIENTA.TE—a project that promotes social and professional inclusion of young people from disadvantaged backgrounds. Sara participated in the study “Needs in Portugal: Tradition and Emerging Trends”. She has a Bachelor or Arts degree in Sociology and PG degree in Economics and Public Policy. (email: s.almeida@tese.org.pt)

In 2008, Tecnologia, Educação, Saúde e Engenharia (TESE)<sup>1</sup> developed the study “Unmet Needs in Portugal—Tradition and emerging trends.” The purpose of this study was to identify opportunities for investment in creative and socially innovative responses to unmet needs in the country.

In the last five decades, Portugal underwent social changes at a frantic pace never before recorded. Between 1960 and 2000, several social structuring systems became universal, namely the Education System which brought the illiteracy rate down from 40 per cent to 8 per cent; the National Health Service for which coverage is now

national; and the State Social Protection Programme which ensured minimum rights for the most vulnerable.<sup>2</sup> However, despite the unquestionable occurrence of quantitative social progress, Portugal continues to be a country marked by strong social inequalities. Her full economic potential is also not being recognised, and this is especially apparent when compared to the other countries in the European Union (EU). It is common to hear from different authors that Portugal is a country of contrasts, and it is in the heart of the paradoxes and tensions that new challenges and needs arise.

The current economic crisis is shaping a new Portuguese society, changing the future of generations to come. The universally legitimised Structural Adjustment Programme imposed by the International Monetary Fund during the last three years seems to have pinned her down to her incorrigible past rather than assisted her in moving forward into the future.

Contrary to what one might expect, the public social policies, mainly because of their tendency to be less dynamic, have not succeeded in anticipating emerging social trends. The approach has been reactive; like a sedative, it is merely a temporary measure in treating problems in a context of never-ending emergencies.

Indeed, it is the capacity to anticipate future needs that will ensure societal prosperity, life quality and social cohesion in the country.

### NEEDS – AN OPERATIVE NOTION

The notion of need is a broad one, especially when considering the complexity of the term “human need”. This study adopts an *operative* notion of needs: something reporting to a multidimensional set of elements (not

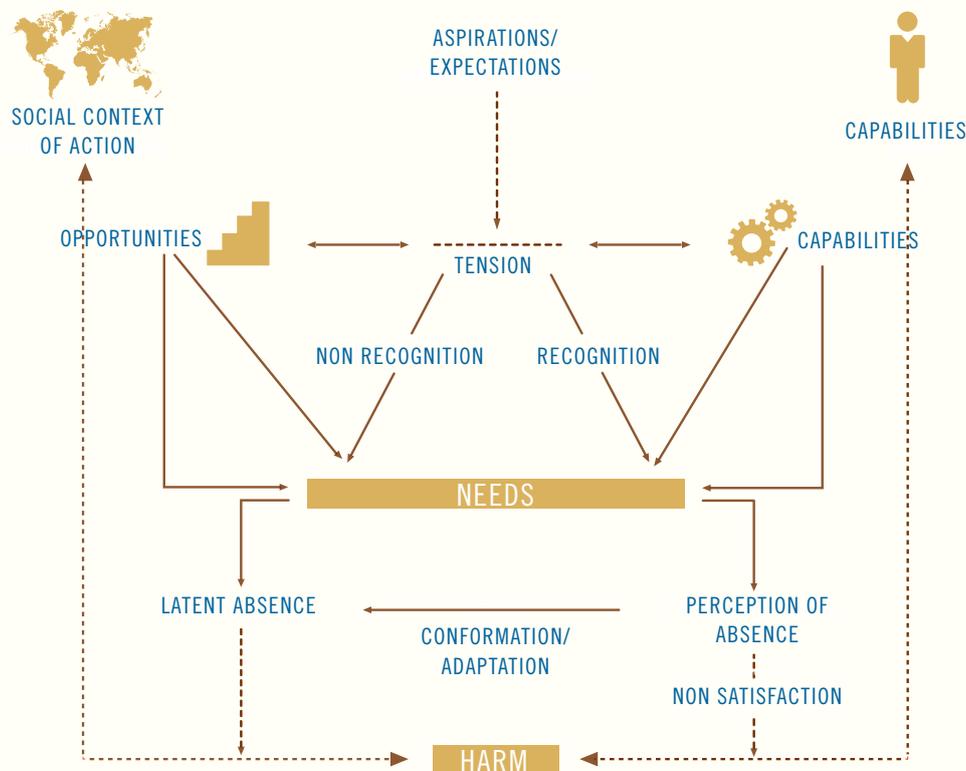
CONCEPTUAL MODEL<sup>4</sup>

Figure 1

simply associated with the physical survival of individuals). The poor or unsatisfactory provision of this set of elements can cause harm to people, families and society—physical, psychological or social damage. It also hampers the full social integration of individuals, and disrupts and harms the optimisation of individual and collective life opportunities.<sup>3</sup>

This study assumes that needs are generated by the non-achievement of individual aspirations/expectations, through a mismatch between opportunities and capabilities, in a dynamic process between the social context of action and the individual. (See Figure 1)

On one hand, there are needs that can be recognised, and with regard to these needs, there is a “perception of absence” by the individual or society. On the other hand, there are needs that *cannot* be recognised, and these assume a “latent absence.” In the case where needs are recognised, there can be further conformation/adaptation to the manifested absence by the individual, allowing these needs to later also assume a latent absence.

The “non-satisfaction” of either recognised needs or latent ones can cause harm (physical, psychological and social), and this is the practical expression of needs. Based on a plural and non-hierarchical typology of needs, we identified four major types of needs:

- **Physical needs and resources** – material conditions associated with guaranteeing survival and avoiding deprivation (economic resources, shelter and housing conditions, access to employment and work conditions, health and environmental safety);
- **Needs for skills and capabilities** – skills and aptitudes necessary for taking part in society and exercising freedom<sup>5</sup> and the possibility of influencing and managing change(s);
- **Social and relationship needs** – relationship needs (friendship, work, family, relatives), feelings of belonging, emotional support, advice, understanding—the need for others, participation in the local community, building personal and social identities;
- **Personal development and well-being needs** – The need for recognition, personal fulfilment, well-being, and happiness.

## NATIONAL SURVEY – A GLIMPSE OF THE KEY FINDINGS

Despite the rapid economic growth of Portugal in the last quarter of the 20th century, the current financial crisis was reflected in the perceptions of the population in a 2008 survey, where physical needs and resources featured predominantly.

The results of the survey led to the following conclusions:

- A fifth of respondents live below the poverty line and reveal difficulties in paying household bills, purchasing food and providing for schoolchildren. The results show that 57 per cent of households surveyed live on less than €900 per month and 42 per cent admit they cannot yet afford to enjoy the whole period of sick leave, while 12 per cent acknowledged having no money to buy medicines they needed.
- Despite enjoying their work, respondents are dissatisfied with their salary levels. The survey shows that 41.3 per cent of the Portuguese workers live in a situation of precarious employment, and over 50 per cent consider their payment unfair.
- The life satisfaction reaches, on average, 6.6 on a scale of 1 to 10. The degree of happiness reaches 7.3 on the same scale, revealing a gap between the perception of the objective conditions of life and perception of well-being.
- Family and friends are the main factors for life satisfaction of respondents;
- Trust in others and institutions is very low: trust in others reaches on average 4.5 on a scale of 1 to 10, where 10 is assumed to be “I am able to trust in most people.”

Judging by the recent statistics in PORDATA 2013<sup>6</sup>, the global situation is not getting better. Unemployment rate increased by approximately 8 per cent (Portugal is now facing an unemployment rate of 20 per cent, with a youth unemployment rate of 42 per cent), anticipating an aggravation of the demand of resources to satisfy physical needs. As reported in Observatorio Portugues Dos Sistemas De Saude,<sup>7</sup> about 30 per cent of respondents said they had stopped taking medication or had increased the spacing between doses, while 69 per cent of the patients replaced the usual drugs with cheaper alternatives due to economic difficulties. Household disposable income fell for the first time in 50 years, according to INE<sup>8</sup> and PORDATA 2013.

## VULNERABLE PROFILES

In addition to the quantitative mapping of needs in Portugal, TESE’s study sought to deepen our understanding of the relationship between the (dis)satisfaction of needs and the daily lives of vulnerable groups in Portuguese society, through six studies. The various studies allowed us to identify the constraints experienced by respondents and the strategies they pursue to address the constraints. We also highlight the spaces of mismatch between strategies and opportunities for possible future actions of the public, private and third sectors.



### 1. Sandwiched Families

Sandwiched families are characterised by existing at levels of income slightly above the official poverty line, having difficulty meeting their needs and finding themselves in a vacuum of social protection. They are not poor families, but neither do they have enough resources to meet basic needs (i.e., housing, education, food). Respondents perceived themselves as lacking protection in relation to other socio-economically more vulnerable groups, and revealed a dire lack of financial support for their university education plans or those of their children’s education.



### 2. Overloaded Workers

The study focused on the life conditions of individuals who work more than 10 hours a day and find themselves torn between work and family. It also identified low salaries in occupations with lower qualifications as the factor hindering the reduction of working hours and causing work overload for the employee. Furthermore, the pressure to invest time at work and the existence of a “long-working-hour culture” in many work environments hinders the adoption of family-friendly working hours. On the other hand, childcare services rarely coordinate with parents’ long working hours, thereby demonstrating a lack of strategies for reconciliation of work and family life.



Porto, Portugal. Source: Jared Tham



### 3. Individuals with Small-scale Economic Activities

This study refers to individuals who develop small-scale economic activities at risk of extinction (e.g., subsistence agriculture and handicrafts). These individuals attempt to reconcile work and family life. Respondents complained about the excessive bureaucratic burden associated with the economic regulatory system, difficulty in accessing EU funds, insufficient support given to the economic activity (mostly during start-up and early developmental phases) and the lack of technical support in bureaucratic processes for new business initiatives.



### 4. Adults in Training Transition

The study analysed the impact that the upgrade on skill levels had on graduates from areas with low employability, and adults who participate in additional training programmes (namely those adults from the extension school programme “New Opportunities”). The individual’s goals and opportunities reflect scepticism with regard to their perception of opportunities available (e.g., constant complaints on the lack of job opportunities for recent graduates or a sceptical view of the New Opportunities Programme).<sup>9</sup>



### 5. Adults in Transition to Retirement

This group is characterised by individuals who recently retired (for a period of six to twelve months). Included here are individuals forced into retirement (situations such as unemployment, contract ending, company closures, etc.) and individuals who voluntarily opted for early retirement. Respondents recognised that the older generations and their pensions represented a heavy burden for future generations and that they feared being affected by a general worsening of living conditions in society.



### 6. Isolated Elderly

This study attempted to unveil the reality of individuals aged over 75 years old who live in social and/or geographical isolation. It identified a lack of public policies supporting informal caregivers. There is inadequate infrastructure across the country for the third age (elderly) and this is a reflection of policies that assume a standard provision for all groups of people.

## PRACTICAL RECOMMENDATIONS FOR PORTUGAL

Fulfilling the coveted goal, the study “Unmet Needs in Portugal” identified four areas of action that incorporate a set of recommendations in order to inform and influence the intervention of the public, private and third sector.

- Axis 1 – Support and reinforce the role of the labour market not only as a prime factor in the satisfaction of physical needs and resources, but also as a source and space for the exercise of social rights and the construction of a personal and social identity.
- Axis 2 – Customise and innovate to integrate public policies affecting the vulnerable groups identified.
- Axis 3 – Promote resilience and empowerment of vulnerable populations in order to trigger change in power relations.
- Axis 4 – Promote trust as the basis for social cohesion and ingredient of an active and sound citizenship.

In light of the recommendations and the need to take into account the specific nature of needs of the most vulnerable groups, TESE created new answers in tandem with some of the recommendations in the four axes, thus contributing to sustainable development in Portugal.

In Axis 1 and 3, we developed solutions aimed at creating equity, social cohesion, employment and quality of life with a special focus on youth, promoting resilience and triggering capacity. Having predicted in 2008 a rampant growth in youth unemployment (from 20 per cent in 2008 to 42 per cent in 2013), TESE developed projects to better prepare youngsters for the labour market which has become increasingly competitive. Between 2008 and 2010, TESE created two projects called ORIENTA.TE and Faz-te Forward in response to the need for social cohesion and competitiveness of Portuguese society. These projects offer support to young people who have limited opportunities, and attempt to counter the phenomenon of local disintegration.<sup>10</sup>

There are multiple complex problems, but it has been recognised that the lack of equal access to opportunities triggers and aggravates those problems. As stated by the Ministry of Labour and Social Solidarity or MTSS in the official document of the National Strategy for Social Protection and Inclusion, “a society with greater social cohesion and less exclusion may ... contribute to improve the competitiveness, create better conditions for the economy to strengthen and grow more and in a sustainable way.”<sup>11</sup>

Reflecting on this link between social cohesion and competitiveness, Portugal is one of the countries in the EU with comparatively lower levels of social cohesion

(shown, for example, by the high rate of economic inequality).<sup>12</sup> Simultaneously, according to the European Commission in 2008, she has one of the lowest levels of competitiveness and creativity compared to other European countries.<sup>13</sup> As such, a commitment to develop and nurture talent in disadvantaged youth will increase social cohesion by enhancing equal access to opportunities in these groups. This will strengthen the competitiveness of the country, to the extent that “the promotion of equal opportunities propels economic growth by mobilizing resources that were previously blocked due to discrimination and social exclusion.”<sup>14</sup> Both projects (ORIENTA.TE and Faz-te Forward) aim to support the potential of young people from disadvantaged backgrounds, providing them with the skills, knowledge and social networks, to enable them to develop their talent and act as agents of change in their lives and that of their communities. These projects involve coaching, mentoring, job shadowing and other interactive programmes. The results obtained by both projects have been encouraging: among those who attended Faz-te Forward, the success rate in employment exceeds 60 per cent, while those attending ORIENTA.TE have seen the success rate surpassing 50 per cent.

Another interesting example that has resulted from Axis 2—*Customise, innovate and integrate public policies*, takes into account the dimension of public policies and the steering-up of civil society. The Unmet Needs Study made reference to the importance of empowering third sector organisations through the implementation of tools and training programmes, new processes and innovative skills for increasing efficiency and/or social impact of organisations when answering needs. They also aim at facilitating the emergence and dissemination of good ideas that work to address social goals, strengthening organisational culture, developing operational efficiency and establishing transparency in practice. These organisations will develop into accountable agents and have a say in the discussion, development, and implementation of solutions for social problems.

In 2012, several organisations from the public, private and third sector decided to create a new project to fulfill needs from the third sector, improve performance and deliver better services. The Melhor Ação e Inovação Social (MAIS Project) or Better Action and Social Innovation<sup>15</sup>, was thus created as a partnership of UDIPSS-Porto<sup>16</sup>, TESE, Impulso Positivo, Catholic University, Calouste Gulbenkian Foundation, Montepio Foundation and Accenture. It’s still too early to measure its impact, but MAIS is inspiring and changing the views of its participants.

A last example that emerged from Portuguese society is

in response to Axis 4—*promote trust as the basis for social cohesion and ingredient of an active and sound citizenship*, and was the creation of the Francisco Manuel dos Santos Foundation in 2009. Its main objective is to “encourage the study of the Portuguese reality, in order to contribute to the development of society, the strengthening of citizens’ rights and the improvement of public institutions.”<sup>17</sup> Under the motto, that access to information promotes independence and freedom of choice, numerous studies on all sorts of subjects have already developed, and this institution provides public data and develops debates and discussion on current problems of Portuguese society.

## CONCLUSION

The results of the study “Needs in Portugal: tradition and emerging trends” serves as a useful technical support to the planning of answers aimed at responding in innovative ways to emerging needs and new contours assumed by traditional needs (e.g., health, employment, housing, etc.) in the context of profound change and instability.

It has been three years since the completion of the study, and the economic and financial situation of the country has proved increasingly fragile, given the stringent pressure from financial markets. In April 2011, the country negotiated for a financial bailout with Troika (The European Commission, International Monetary Fund and European Central Bank) aimed at “restoring confidence in the banking and public sectors, as well as supporting growth and employment.”<sup>18</sup>

The tensions generated by the ongoing economic downturn, as well as the results of the fiscal readjustments imposed upon the country, have clearly aggravated the needs already identified—either related to areas of physical needs or resources, skills or ability, the socio-affective aspect, personal development or well-being.

In the last three years, other highly vulnerable groups may have arisen or we may have witnessed a sharpening of the needs of previously targeted groups, such as sandwiched families and small-scale economic activities’ entrepreneurs. However, the study’s recommendations remain relevant and pertinent.

Today, even after three years, Portugal requires concerted responses to its citizens’ growing and stringent needs—we want and need innovative and integrated answers stemming from coordinated efforts involving the public, private and third sectors.

Change is happening. ■

## Endnotes

- 1 In English, TESE stands for Technology, Education, Health and Engineering.
- 2 António Barreto, “Mudança Social em Portugal 1960-2000,” Working Paper, ICS-UL, Lisboa, 2002.
- 3 Teresa Costa, et al, “À Tona de Água I. Necessidades em Portugal, Tradição e Tendências Emergentes,” Lisboa: Edições Tinta-da-China, The Young Foundation in Pinto, 2010.
- 4 Ibid, 72.
- 5 Ruut Veenhoven, “Notions of the Good Life” in *Oxford Handbook of Happiness* ed. Susan David, Ilona Boniwell, and Amanda Conley Ayers, (Oxford : Oxford University Press, 2013), 161-173.
- 6 PORDATA is the database source for official and certified statistics about Portugal and Europe. See PORDATA (2013) – Base de Dados de Portugal, [www.pordata.pt/Portugal](http://www.pordata.pt/Portugal).
- 7 “Relatório de Primavera 2013 - As duas faces da Saúde”, OPSS, Lisboa. [www.observaport.org/](http://www.observaport.org/).
- 8 See *Statistics Portugal* or *Instituto Nacional de Estatística*, [www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_main#](http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_main#).
- 9 New Opportunities Programme was a national initiative of the Portuguese government to facilitate access to education in order to increase rates of education in Portugal.
- 10 The concept encompasses the erosion of resources, under-or over-utilisation of local resources, socio-political and communitarian disintegration (i.e., it can also be understood as the absence of forms of collective action aimed at solving local problems, namely, the promotion of access to employment). <http://opac.iefp.pt:8080/images/winlibimg.exe?key=&doc=73286&img=426>.
- 11 Governo de Portugal, MTSS, 2008, [www.portugal.gov.pt/pt.aspx](http://www.portugal.gov.pt/pt.aspx).
- 12 Observatório das Desigualdades, <http://observatorio-das-desigualdades.cies.iscte.pt/>.
- 13 Comissão Europeia (2013) – Ajuda Económica a Portugal, [http://ec.europa.eu/portugal/temas/ajuda\\_economica\\_portugal/index\\_pt.htm](http://ec.europa.eu/portugal/temas/ajuda_economica_portugal/index_pt.htm).
- 14 Governo de Portugal, MTSS, 2008, [www.portugal.gov.pt/pt.aspx](http://www.portugal.gov.pt/pt.aspx).
- 15 MAIS project, [www.udipss-porto.org/mais/informacoes/](http://www.udipss-porto.org/mais/informacoes/).
- 16 UDIPSS-Porto is the name of the District Union of Charitable Institutions. There are a few in the main cities in Portugal. UDIPSS-Porto is in Oporto and represents more than 300 charities from the north of Portugal.
- 17 Fundação Francisco Manuel dos Santos, [www.ffms.pt/en](http://www.ffms.pt/en).
- 18 European Commission, 2013.