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SOBRE A POBREZA, AS DESIGUALDADES E A PRIVAÇÃO MATERIAL EM PORTUGAL/POVERTY, INEQUALITIES AND MATERIAL DEPRIVATION IN PORTUGAL, INSTITUTO NACIONAL DE ESTATÍSTICA, (2010)

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Doubtless poverty and inequality are among the main problems affecting postmodern societies. In Portugal, these problems are becoming more acute than in other countries, mainly since 2001 and even more so since 2008. As in other countries, the situation is the result of the fact economic growth, and the public policies that have enabled it, has allowed for an increase in income inequality and in new types of poverty.

The eradication of poverty has been one of the main topics of discussion in several forums in the last decades and was chosen by the United Nations as the primary goal to be achieved by 2015. This agenda was established in the aims of the eight Millennium Development Goals proposed in 2000 by the United Nations and signed by 189 member states. Taking into account the development of the member states in the last 30 years in terms of economic growth, we will have to wait a little longer to achieve such a goal.

After an international decade dedicated to the eradication of poverty by the United Nations (from 1997 to 2006), we are now into a second that started in 2008.

Poverty and social exclusion were used for a long time as indistinct concepts, but at present poverty is seen as one dimension of social exclusion (Pascal and Bourgeat 2008). Poverty is related to unequal access to material resources, while social exclusion is used as a broader concept, focused on an unequal access to full participation in society (Kenyon, Lyons and Rafferty 2002).

Poverty is usually measured in either absolute or relative terms. While absolute poverty refers to a defined standard which is consistent over time and among countries (for example, the percentage of the population eating less food than is required to sustain the human body (www.worldbank.org – accessed 15 March 2009), relative poverty deals with a social definition of poverty and is dependent on a certain social context. Relative poverty is measured by the percentage of the population endowed with less income than some fixed proportion of the average income (www.worldbank.org – accessed 15 March 2009). The European Union based the poverty line on the concept of ‘economic distance’; a level of income settled at 60 per cent of the average household income.

Collecting data on the range and severity of poverty is, at present, the responsibility of public administration and governments. All citizens have the right to access this information. In such a context, and because 2010 was declared by the European Union as the European Year for Combating Poverty and Social Exclusion, the National Statistics Institute (Instituto Nacional de Estatística – INE) made an effort to obtain data on the Portuguese situation concerning poverty, inequality and deprivation. To fulfill that aim, the INE recently published an interesting analysis of the issue – *Sobre a pobreza, as desigualdades e a privação material em Portugal/Poverty, inequalities and material deprivation in Portugal* (2010).

The report is divided into three parts, and the introduction (pp. 3–4) and executive summary (pp. 11–20) have been translated into English.

The first part (pp. 23–31), entitled 'Enquadramento teórico' (theoretical framework), is recommended reading, as its author, the economist Manuela Silva, explains the evolution of the concept of poverty and makes clear the need for making available more complete statistics about this subject. The second part (pp. 35–82) deals with 'some aspects of the distribution and redistribution of income' ('Aspectos distributivos e redistributivos do rendimento'), and the third (pp. 85–125), written by several Portuguese researchers, raises a 'discussion of some topics' ('Pontos de reflexão').

Conducting a critical appreciation of the report, one would like to comment on the results obtained for the main indicators, keeping in mind data from the annual Survey on Income and Living Conditions (SILC). The survey collected a representative sample of private households in Portugal and the data collected made possible an analysis for the period from 2003 to 2008. The problems of the welfare state and the growing privatization of public services are thought to have impacted, in a short space of time (since 2008), on the extension and severity of poverty and inequality felt in Portugal. Involuntary poverty is nowadays seen as a violation of human rights and opens the possibility of improvement of the statistical concept (INE 2010), even if it remains difficult to build a composite index.

In 2008, 17.9 per cent of the Portuguese resident population was at risk of poverty. This is lower than the figure for 2003 (20.4 per cent). This means that, in 2008, the annual income of those at risk was below the poverty line, i.e. 4969 euros (that is, an average monthly income of 414 euros).

Portugal shows a large asymmetry in the distribution of household income. In 2007, the Gini coefficient for Portugal was 35.8 per cent versus 30.6 per cent for the European Union as a whole. Even so, this inequality has gradually decreased since 2004 (from 38.1 per cent in 2003 to 35.4 per cent in 2008). The risk of poverty among the elderly also declined between 2003 and 2008, from 28.9 per cent to 20.1 per cent, but when comparing this group to the total resident population, the risk was higher. Also, the material deprivation index of the elderly was calculated to be higher (24.7 per cent) than that of the entire population (21.4 per cent).

In 2008, households with two adults and at least three dependent children were at the highest risk of poverty (42.8 per cent), along with households with one adult and dependent children (38.8 per cent) and the elderly living alone (32.7 per cent). The risk of poverty for households without dependent children was much lower (14.9 per cent) when compared with those that had dependent children (20.6 per cent). It is important to mention that the concept of dependent children has to do with individuals under 18 years of age, with those between 18 and 24 years of age being considered economic dependents.

But we cannot forget the groups of children and women, which continued to show a high risk of poverty in 2008. These are the groups that showed the worst evolution since 2004. The infant poverty data shows that one child in five faced a situation of deprivation, and it was within single-parent families and households with two adults and at least three children that this scenario was most serious. In fact, about half of the children were at risk of poverty or deprivation. In the same year about 19 per cent of Portuguese adult women were at risk of monetary poverty (2 per cent above the European average and 3 per cent above the Portuguese adult-male average).

In the third part of the report there is an interesting analysis by Carla Machado of women's poverty, calling for a deeper analysis of material deprivation, particularly regarding gender-specific items, intra-household income distribution, and sampling designing that would make it possible to better take into account single-parent families.

Social-class origin has proven to be an important factor behind the education path followed by children, as 72.5 per cent of children who had parents with occupations such as businessman, business manager and scientific or technical professional were able to attain a secondary or higher level of education.

The average monetary income of the individuals that had an undergraduate degree was double that of the total resident population (830 euros more per month). Nevertheless, between 2003 and 2008, the evolution of monetary income available was positive for all levels of education, including those who had not completed secondary-level education (3.4 per cent).

Finally, it is worth mentioning that in 2008 the average income of individuals that lived in high-density areas was superior to that of the total resident population (1780 euros more). This did not occur in the case of intermediate and low-density areas.

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