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OLD AGE AND SICKNESS ACCOUNTED FOR MORE THAN 75% OF SOCIAL BENEFITS

In 2024, receipts from all social protection schemes (excluding transfers between schemes) were €79,514 million, with contributions from general government being the main source of receipts, accounting for 42.5% of the total, followed by employers' social contributions (30.9%). Social contributions from protected persons accounted for 16.6% of total receipts of social protection schemes.

In 2024, expenditures across all social protection schemes (excluding transfers between schemes) were €72,236 million, with social benefits accounting for 92.9% of the total. In terms of risk coverage, old age and sickness protection functions accounted for more than 75% of the total benefits granted, with 47.8% and 28.0%, respectively.

Expenditures on pensions reached €37,677 million in 2024, representing 56.1% of the total value of social benefits granted by social protection schemes and reflecting a less marked increase in nominal terms than that observed for social benefits in general. Old age pensions remain the most significant category, accounting for 78.5% of the total value of pensions.

In 2024, there were 2,942 pension beneficiaries, 2.4% less than the number recorded 10 years earlier, because of a decline in the number of disability pension beneficiaries. The number of survivors' pension beneficiaries remained relatively stable, whilst the number of old age pension beneficiaries increased by 3.7%.

A comparison with the European Union for 2023 highlights the larger contribution of pensions to social protection expenditures in Portugal (excluding transfers between schemes): 53.6% compared with 44.2% in the European Union. In terms of their share to the total, expenditures in Portugal fall short of that of the European Union especially in benefits associated with housing, unemployment and family.

THE BALANCE BETWEEN SOCIAL PROTECTION RECEIPTS AND EXPENDITURES HAS BEEN POSITIVE SINCE 2004

In 2024, receipts from all social protection schemes amounted to €79.5 billion. Between 1990 and 2024, there was a sustained trend of growth assessed at current prices, except for the years 2011 and 2012 when Portugal was under an international financial assistance programme. The decline in those two years also affected expenditures, which stood at €72.2 billion in 2024.

The balance between receipts and expenditures of social protection schemes was, in 2024, €7.3 billion, which representing a decrease compared with 2023, when the receipts-expenditures balance had reached the

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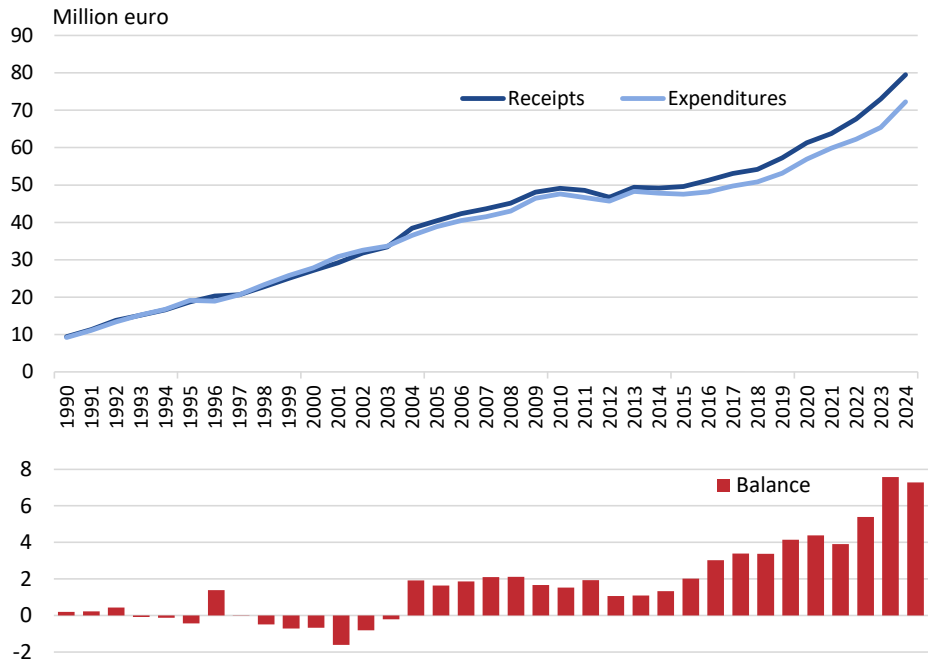
highest value in the series under review (€7.6 billion). Over the 35-year period between 1990 and 2024, the balance was negative in only nine years: between 1993 and 1995 and between 1998 and 2003.

Figure 1

SOCIAL PROTECTION RECEIPTS, EXPENDITURES AND BALANCE, PORTUGAL, 1990-2024



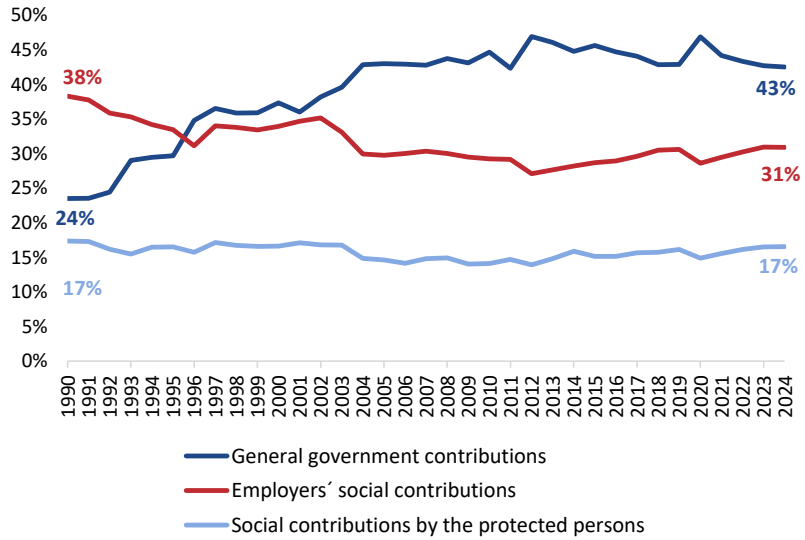
PUBLIC CONTRIBUTIONS ARE THE MAIN SOURCE OF SOCIAL PROTECTION RECEIPTS

In 2024, receipts from total social protection schemes (excluding transfers between schemes) totalled €79,514 million, with contributions from general government being the main source of receipts (42.5% of the total), followed by employers' social contributions (30.9%). Social contributions from protected persons accounted for 16.6% of total receipts of social protection schemes.

Between 1990 and 1995, employers' social contributions were the main source of receipts. In 1990, they represented 38.3% of total receipts and, in 1995, they accounted for 33.5%. Since 1996, the largest contribution to receipts has come from contributions from general government, particularly in the period between 2012 and 2015, as well as in 2020. Social contributions from protected persons have accounted for a relatively stable share of total receipts, at around 16%. The remaining components of receipts – transfers from other schemes and other receipts – accounted for 10.0% of total receipts of the system in 2024.

Figure 2

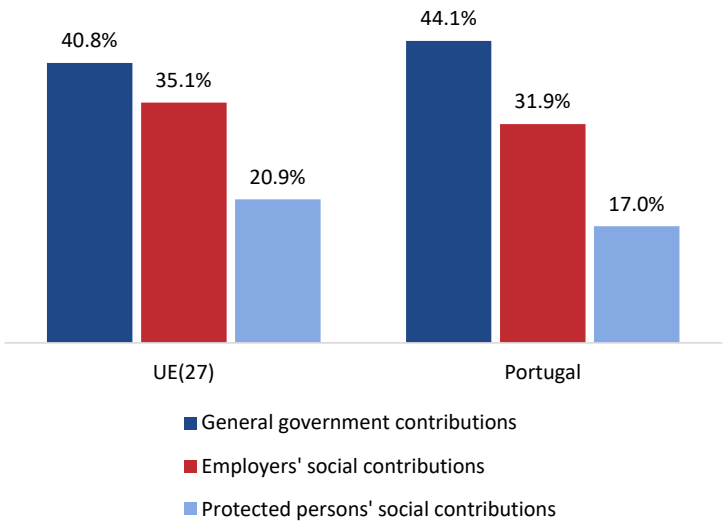
SOCIAL PROTECTION RECEIPTS BY NATURE, PORTUGAL, 1990-2024



Taking the year 2023 and consolidated receipts from transfers between schemes as a reference, to allow for comparison with the aggregated data for the European Union, a larger relative share of the contributions of general government stands out in comparison with the aggregated data for the European Union results (44.1% and 40.8%, respectively). Consequently, employers' social contributions and from the protected persons account for a larger share in the European context than at national level.

Figure 3

SOCIAL PROTECTION RECEIPTS BY NATURE, EUROPEAN UNION AND PORTUGAL, 2023



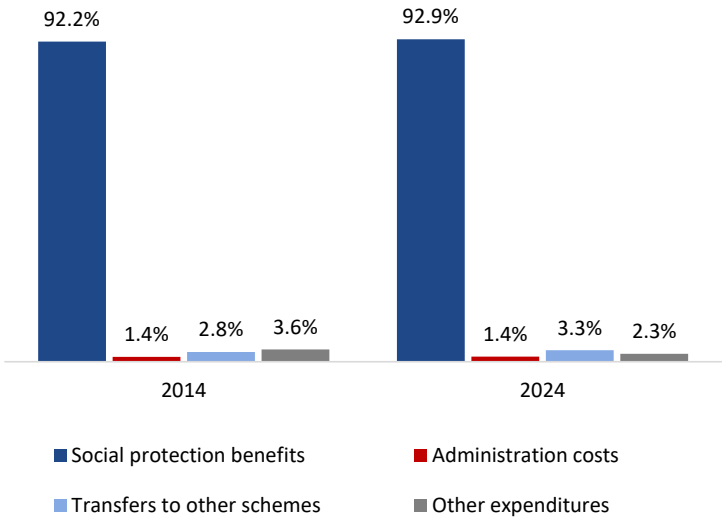
IN 2024, OLD AGE AND SICKNESS ACCOUNTED FOR MORE THAN 75% OF SOCIAL BENEFITS

In 2024, expenditures across all social protection schemes (excluding transfers between schemes) amounted to €72,236 million, with social benefits accounting for 92.9% of the total.

This proportion has remained stable between 2014 and 2024, with administrative costs, transfers to other schemes and other expenditures accounting for a small share of total expenditures.

Figure 4

SOCIAL PROTECTION EXPENDITURES BY NATURE, PORTUGAL, 2014 AND 2024



In 2024, total expenditures on social protection schemes represented 24.9% of Gross Domestic Product (GDP) at market prices, whilst in 2023 it had stood at 24.2%. Expenditures on social protection benefits amounted to 23.2% of GDP in 2024, compared with 22.5% in 2023.

Total social protection expenditures per inhabitant in 2024 were €6,344, €503 more than the figure calculated for 2023 (€5,840). Expenditures on social benefits per inhabitant stood at €5,894 in 2024, compared with €5,434 in 2023.

In terms of risk coverage, old age and sickness protection accounted for more than 75% of the total benefits paid in 2024, with 47.8% and 28.0%, respectively. Expenditures on survivors', disability and family benefits accounted for between 6% and 8%, whilst expenditures on unemployment, housing and social exclusion functions accounted for less than 3% of the total.

In 1990, expenditures on social protection for old age accounted for 32.4% of the total, followed by a period of growth that led to proportions above 50% between 2014 and 2018. In recent years, the contribution of

the old age function to social protection expenditures has stabilised at around 47%. Expenditures on social protection for sickness were overtaken by that for old age in terms of its share of total value of social benefits in 1996 and continued to decline until 2013. Since 2014, the proportion of expenditures on social protection for sickness has shown an upward trend.

Figure 5

EXPENDITURES ON SOCIAL BENEFITS BY FUNCTION, PORTUGAL, 1990-2024

	Sickness	Disability	Old age	Survivors	Family	Unemployment	Housing	Social exclusion
1990	35.5%	15.4%	32.4%	6.9%	6.4%	3.1%	0.0%	0.3%
1991	34.6%	14.9%	32.9%	7.2%	6.6%	3.4%	0.0%	0.4%
1992	34.1%	14.5%	33.4%	7.3%	6.2%	4.0%	0.0%	0.5%
1993	34.2%	14.2%	32.9%	7.1%	5.8%	5.3%	0.0%	0.4%
1994	35.3%	14.4%	32.1%	6.9%	5.3%	5.6%	0.0%	0.4%
1995	36.2%	11.8%	34.3%	6.8%	5.2%	5.3%	0.0%	0.4%
1996	31.5%	12.6%	36.9%	7.5%	5.3%	5.8%	0.0%	0.4%
1997	31.8%	13.0%	36.7%	7.6%	5.3%	5.1%	0.0%	0.6%
1998	32.0%	12.7%	36.8%	7.3%	5.2%	4.7%	0.0%	1.3%
1999	32.4%	12.2%	37.6%	7.3%	5.2%	3.7%	0.0%	1.6%
2000	32.0%	12.7%	37.6%	7.1%	5.4%	3.7%	0.0%	1.4%
2001	31.3%	12.3%	38.6%	7.1%	5.6%	3.6%	0.0%	1.3%
2002	30.9%	11.7%	38.5%	6.9%	6.5%	3.9%	0.0%	1.6%
2003	28.8%	11.5%	39.3%	6.9%	6.5%	5.5%	0.0%	1.5%
2004	30.5%	10.4%	40.1%	7.0%	5.3%	5.7%	0.0%	1.0%
2005	30.2%	9.8%	41.2%	6.7%	5.2%	5.8%	0.0%	1.0%
2006	29.2%	9.9%	42.1%	7.0%	5.1%	5.5%	0.0%	1.1%
2007	28.3%	10.0%	42.9%	7.1%	5.3%	5.1%	0.0%	1.2%
2008	28.0%	9.3%	44.2%	7.3%	5.5%	4.5%	0.0%	1.2%
2009	28.7%	8.4%	43.5%	7.2%	5.5%	5.4%	0.0%	1.4%
2010	27.6%	8.2%	44.4%	7.3%	5.5%	5.7%	0.0%	1.4%
2011	25.1%	8.2%	47.8%	7.4%	4.9%	5.5%	0.0%	1.2%
2012	25.0%	7.4%	47.2%	7.5%	4.9%	6.8%	0.0%	1.1%
2013	23.8%	7.7%	48.8%	7.3%	4.6%	6.9%	0.0%	0.9%
2014	23.9%	7.4%	50.0%	7.5%	4.6%	5.8%	0.0%	0.9%
2015	24.3%	7.3%	50.7%	7.6%	4.7%	4.6%	0.0%	0.8%
2016	25.2%	7.2%	50.2%	7.6%	4.9%	3.8%	0.0%	1.0%
2017	25.5%	7.1%	50.7%	7.6%	4.9%	3.2%	0.0%	0.9%
2018	26.1%	7.0%	50.1%	7.7%	5.1%	3.0%	0.0%	0.9%
2019	26.7%	7.2%	49.4%	7.7%	5.2%	2.8%	0.0%	0.9%
2020	26.7%	6.8%	47.1%	7.5%	5.2%	5.8%	0.0%	0.9%
2021	27.8%	6.8%	46.2%	7.4%	5.1%	5.7%	0.0%	0.9%
2022	28.7%	6.7%	47.5%	7.6%	5.3%	2.9%	0.0%	1.4%
2023	28.2%	6.6%	47.3%	7.5%	6.1%	2.6%	0.5%	1.3%
2024	28.2%	6.6%	47.3%	7.5%	6.1%	2.6%	0.5%	1.3%

The survivor's function has accounted for a relatively stable proportion of total value of social benefits over recent decades, ranging between 7% and 8%, whilst the disability function has declined in importance: from 15.4% in 1990 to 6.5% in 2024.

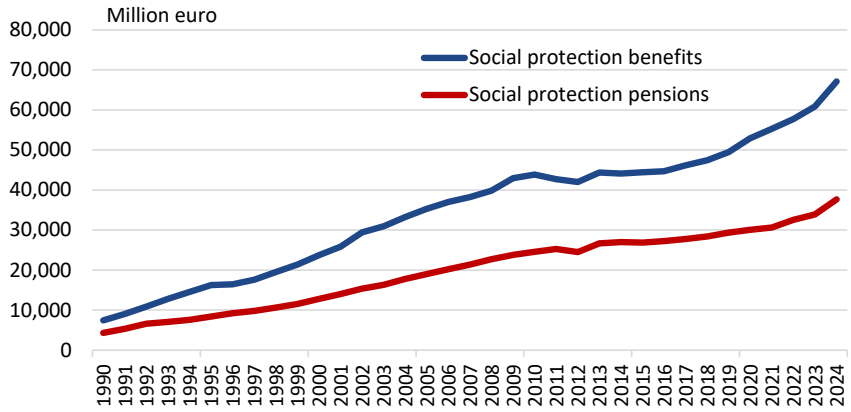
Expenditures on social protection for housing increased significantly in 2023 and 2024, due to the extraordinary rent support which will remain in place until the end of 2028, although its share of social benefits expenditures in social benefits has remained low (0.5%).

IN 2024, OLD AGE PENSIONS ACCOUNTED FOR 78.5% OF THE TOTAL VALUE OF PENSIONS

Expenditures on pensions reached €37,677 million in 2024, representing 56.1% of the total value of social benefits granted by the social protection system and reflecting a less marked increase in nominal terms than that observed for social benefits in general. However, in 2024, total expenditures on pensions increased by 11.1% whilst total social benefits grew by 10.2%.

Figure 6

EXPENDITURES ON SOCIAL BENEFITS AND PENSIONS, PORTUGAL, 1990-2024

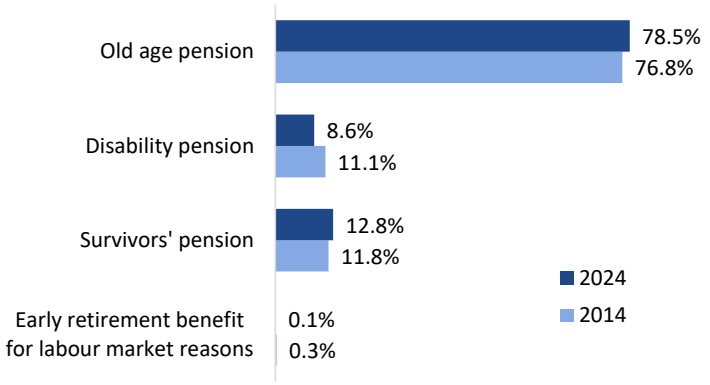


Old age pensions remain the most significant category, representing, in 2024, 78.5% of the total value of pensions granted, an increase on the figure recorded 10 years earlier: 76.8% in 2014.

This increase came mainly at the expense of a decline of relative importance of disability benefits, which fell from 11.1% to 8.6% of the total between 2014 and 2024, whereas the contribution of survivors' pensions to the total value of pensions increased from 11.8% in 2014 to 12.8% in 2024.

Figure 7

EXPENDITURES ON PENSIONS BY CATEGORY, PORTUGAL, 2014 AND 2024

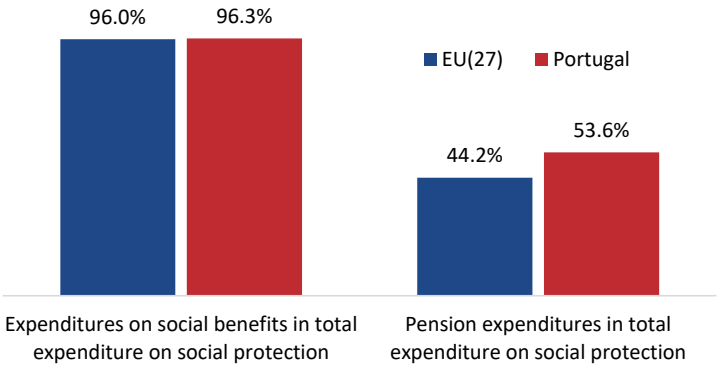


IN PORTUGAL, SPENDING ON SOCIAL BENEFITS FOR HOUSING, UNEMPLOYMENT AND FAMILY SUPPORTIS RELATIVELY LOWER THAN IN THE EUROPEAN UNION

Consolidated[1] expenditures on social protection to €63,223 million in 2023, representing 1.3% of the European Union's total, which compares with a contribution of the country to the European total of 1.6% of GDP. In 2023, expenditures on social benefits accounted for 96.3% of consolidated[1] expenditures on social protection, reflecting a proportion similar to that observed for the European Union. However, the specific contribution of pensions to social protection expenditures was significantly higher in Portugal: 53.6% compared with 44.2% in the European Union.

Figure 8

SOCIAL PROTECTION EXPENDITURES INDICATORS, EUROPEAN UNION AND PORTUGAL, 2023



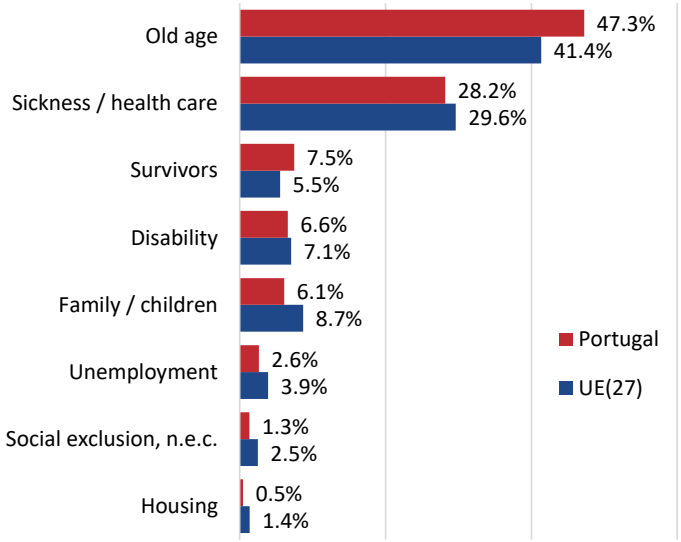
[1] That is, excluding transfers between schemes.

Survivors' and old age social benefits account for a relatively larger share of expenditures in Portugal when compared to the European context.

In the remaining functions, relative expenditures in Portugal are below that of the European Union, particularly in relation to housing, unemployment and family benefits.

Figure 9

BREAKDOWN OF SOCIAL BENEFITS BY FUNCTION, EUROPEAN UNION AND PORTUGAL, 2023



THERE ARE ABOUT THREE MILLION PENSION BENEFICIARIES

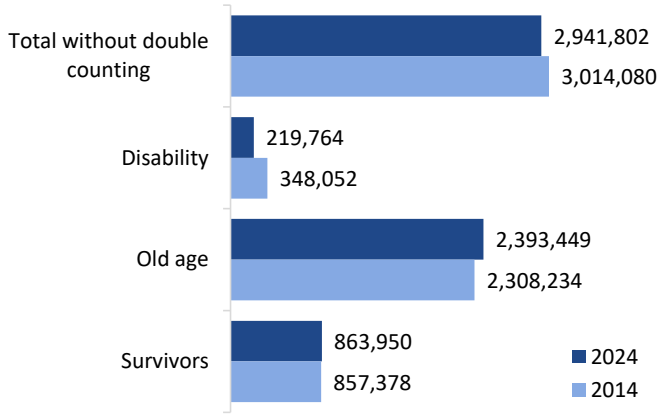
In 2024, there were 2,942 pension beneficiaries, 2.4% less than the number recorded 10 years earlier, as a result of the decline in the number of disability pension beneficiaries. The number of survivors' pension beneficiaries remained relatively stable, whilst the number of old age pension beneficiaries increased by 3.7%.

Between 2014 and 2024, the total number of pension beneficiaries, without double counting, decreased at an average rate of minus 0.2% per year, from 3,014,080 beneficiaries in 2014 to 2,941,802 in 2024.

Over the same period, the number of beneficiaries of old age and survivors' pensions showed an average annual growth of 0.4% and 0.1%, respectively, whereas the beneficiaries of disability pensions showed an average annual change of minus 4.5%. In this case, the downward trend became more pronounced from 2018 onwards, when, in terms of non-contributory pensions, most social disability pensions were incorporated in the social benefit for inclusion, whilst social pensions of the special disability scheme were retained.

Figure 10

NUMBER OF PENSION BENEFICIARIES BY CATEGORY, PORTUGAL, 2014 AND 2024

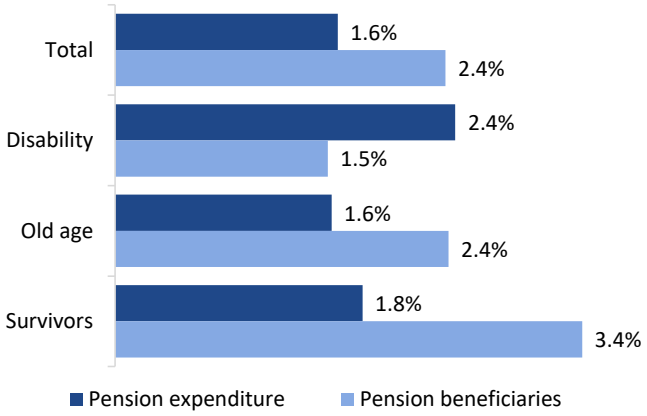


In 2023, pension beneficiaries in Portugal accounted for 2.4% of the total number of pension beneficiaries in the European Union. In terms of pension expenditures, Portugal represented 1.6% of the European Union.

This trend applies to both survivors' and old-age pensions, with amounts per beneficiary below the European average for both categories, whereas the average amount of disability pensions was higher than the European average.

Figure 11

PROPORTION OF PENSION EXPENDITURES AND NUMBER OF PENSION BENEFICIARIES BY CATEGORY IN THE EUROPEAN UNION TOTAL, PORTUGAL, 2023



TECHNICAL NOTE

The results presented in this press release, which are also available on Statistics Portugal website, are based on the application of the integrated accounts methodology of the European System of Integrated Social Protection Statistics (ESSPROS) in Portugal. This System integrates statistical information on the financial flows of social protection expenditures and receipts, with the aim of obtaining comprehensive, up-to-date and comparable statistics between the Member States of the European Union. The analysis presented in this press release covers the European Union comprising 27 Member States.

This methodology was consolidated in the late 70s, and its application has been regulated since 2007. Within the framework of this System, social protection is defined as the set of all interventions from public or private bodies intended to relieve households and individuals of the burden of a specific set of risks or needs. The range of risks covered by the ESSPROS includes sickness and healthcare, disability, old age, survivors, family and children, unemployment, housing, and other social exclusion. Social protection functions are named after the risk they aim to mitigate.

Receipts from social protection schemes are classified according to its nature and by origin of institutional sector. Expenditures of social protection schemes are classified according to their nature and by social protection functions.

The public and private bodies that provide social protection responses are grouped into schemes, that is, organised units with individualised receipts and expenditures accounts and which manage the award of social benefits and respective funding, supported by one or more institutional units. In 2024, the number of national schemes considered in the ESSPROS system of accounts and listed in the table below was 21.

- Accidents at Work
- Association of the Disabled of the Armed Forces
- Benefit paid directly by the employer
- Central Administration
- Charities
- Civil Service Health Care System
- Civil Service Retirement System
- Health Assistance for Army Forces
- Institute for Employment and Vocational Training
- Lisbon Holy House of Mercy
- Local Administration
- Mutualist
- National Health Service and Regional Health Services of the Autonomous Regions
- National Institute of Medical Emergency
- Pension funds

- Public Capitalization System
- Reductions in rates of transport
- Services of Medical Assistance
- Social Services (Public servants)
- Social Security Welfare and Social Protection Systems
- Welfare System of Ministry of Finance

The Statistics Portugal Website publishes data on the social protection system's receipts and expenditures (ESSPROS) dating back to 1990. From 2006 onwards, figures on the total number of pension beneficiaries are also released, broken down by pension categories (disability, old age and survivors') and by sex.

CONCEPTS

Pension: monthly cash benefit continually granted on the occurrence of death (survivors' pension), disability, occupational illness and old age.

Pension beneficiary: person receiving at least one pension from the seven categories of pensions defined in the social protection system.

Scheme: the body of distinct rules, funded by 1 or more institutional units that manage the award of social benefits and respective funding.

Social protection: all intervention from public or private bodies intended to relieve households and individuals of the burden of a defined set of risks or needs, provided that there neither a simultaneous reciprocal nor an individual arrangement is involved.

Social protection expenditures: expenditures of social protection schemes classified by type, indicating the nature of or reason for the expenditures: social protection benefits, administration costs, transfers to other schemes and other expenditures.

Social protection function: the primary purpose for which social protection is provided to relieve households and individuals of the burden of a defined set of risks or needs, irrespective of legislative or institutional provisions.

Social protection receipts: receipts of social protection schemes classified by type and origin: the type indicates the nature of, or reason for, a payment such as social contributions, general government contributions, transfers from other schemes and other receipts; the origin specifies the institutional sector from which the payment is received, such as corporations, central government, state and local government, social security funds, households, non-profit institutions serving households and rest of the world.