

Child Maintenance and Social Assistance in Portugal: Benefit Interactions and Reform Options for the FGADM

¹Maria Rita Nunes, ²Olga Monteiro, ³Alvaro Rocha

^{1,2}University of Minho, Braga, Portugal.

³Lusofona University, Porto, Portugal.

¹maria.rita.nunes330@gmail.com, ORCID ID: [0009-0008-6428-7895](https://orcid.org/0009-0008-6428-7895)

²olga.monteiro@ulssjoao.min-saude.pt, ORCID ID: [0009-0007-4236-3466](https://orcid.org/0009-0007-4236-3466)

³alvaro.rocha@ulusofona.pt, ORCID ID: [0000-0002-0750-8187](https://orcid.org/0000-0002-0750-8187)

**Corresponding Author: Alvaro Rocha*

Abstract: State-guaranteed child maintenance can protect children against parental non-payment, yet its contribution may depend on how FGADM payments are treated in subsequent means-tested benefit assessments. This article examines Portugal's Fundo de Garantia de Alimentos Devidos a Menores (FGADM) through documentary analysis of a public-administration training report, legislation, administrative guidance, and selected international research. It distinguishes access to the guarantee from the treatment of payments in subsequent means tests. The analysis identifies an explicit statutory classification of FGADM payments as maintenance income and examines a potential drafting gap. Illustrative calculations demonstrate how benefit withdrawal could reduce or absorb the incremental household resources associated with the guarantee under specified hypothetical assumptions. A comparison of reform options highlights trade-offs between adequacy, horizontal equity and implementation. The article proposes coordinated legislative revision and an evaluation framework, while making no causal claim about poverty reduction. Portugal's 2026 social-assistance reform reinforces the need to analyze programmes together.

Keywords: Child maintenance, means testing, single-parent families, social assistance, Portugal.

1 INTRODUCTION

Child maintenance guarantees address a specific interruption in family resources: when the person responsible for supporting a child does not pay, the state intervenes. State payment, however, does not necessarily translate into an equal increase in the resources available to the receiving household. If another benefit falls when maintenance is received, the household retains only the difference. This distinction matters for evaluating policies whose stated purpose is to protect children from the consequences of non-payment. Portugal offers an instructive case through the Fundo de Garantia de Alimentos Devidos a Menores (FGADM), translated here as the Child Maintenance Guarantee Fund. The present article develops a proposal originally advanced by Nunes and Monteiro [1] in a final group report prepared for the University of Minho's specialised training programme for intermediate public-administration managers. That report argued that FGADM payments should be excluded from the income assessment governing access to other social benefits. This paper retains its central concern but examines its policy recommendation rather than assuming it is sufficient.

The problem belongs to a wider international debate. Research has distinguished maintenance that supplements social assistance from maintenance that substitutes for it [2], [3]. This article applies that distinction to a state-guaranteed payment in Portugal, identifies the statutory provisions a reform must address, and separates two mechanisms that can otherwise be conflated: exclusion from the guarantee itself and withdrawal of other benefits after the guarantee is paid. It also considers whether a preferential disregard for publicly paid maintenance would treat children with comparable privately paid maintenance differently.

Three questions guide the analysis. How does the documentary record establish the interaction between FGADM payments and selected means-tested benefits examined in the Portuguese policy framework? What does the available evidence support, and what remains unmeasured? Which reform options could protect household resources while addressing consistency, fairness and administrative feasibility? These are questions of policy design and institutional coherence, not estimates of a treatment effect. This article contributes in three ways. First, it distinguishes access to FGADM from the retention of household resources after other means-tested benefits are recalculated. Second, it examines the statutory classification of FGADM payments and identifies a potential drafting gap in the original proposed amendment. Third, it considers how the 2026 legislative framework affects the scope of any future reform. The analysis is therefore a documentary policy and legal analysis rather than an impact evaluation: it identifies mechanisms and design issues but does not estimate the prevalence or causal effects of benefit displacement among Portuguese households.

2 LITERATURE AND ANALYTICAL FRAMEWORK

2.1. Single Parenthood, Resources and Public Policy

Nieuwenhuis and Maldonado's "triple bind" [4] locates single parents' disadvantages at the intersection of resources, employment and policy. A sole resident caregiver may face limited earning capacity and constraints on working time while also navigating support systems poorly aligned with care responsibilities. This approach shifts explanation away from family form alone and towards the institutional conditions under which families secure an adequate livelihood.

Nieuwenhuis's European Parliament study [5] similarly considers single parents' resources, employment, and the policy environment together. Its executive summary explicitly recognises that most single parents in the European Union are employed, are not at risk of poverty and are not materially deprived. Elevated risk therefore does not justify portraying a diverse population as uniformly disadvantaged. For the Portuguese case, the relevant population is narrower still: households affected by unpaid maintenance that satisfy the guarantee's legal conditions.

These perspectives suggest assessing maintenance policy alongside earnings, childcare, housing costs, and other transfers. An improvement in one payment may be important without being sufficient. Conversely, a modest gross payment may matter greatly where it is reliable and does not displace another essential resource. The appropriate question is how the combination of policies affects a household's ability to meet needs over time.

2.2. Maintenance Receipt Interactions with Social Assistance

Hakovirta's comparative study [6] distinguishes recipients' contribution to maintenance from its more limited aggregate contribution across all relevant families. Coverage and receipt therefore matter alongside payment levels. Evidence of a substantial gain among recipients cannot automatically be extrapolated to households that lack an arrangement or receive nothing. Skinner et al. [2] use a model of lone-parent families to examine maintenance and social-security interactions in Australia, New Zealand, the United Kingdom and Wisconsin in the United States. Their analysis shows why nominally similar maintenance systems can produce different resource outcomes when benefit rules are accounted for. Hakovirta et al. [3] subsequently examine Australia, Finland, Germany and the United Kingdom using Luxembourg Income Study data, explicitly incorporating interactions with social assistance. Together, these studies establish the analytical relevance of examining the receiving household's total benefit package rather than maintenance in isolation.

A disregard excludes some or all of a receipt from the income calculation for another benefit. It differs from a pass-through rule, which determines how much of a collected payment is transferred to the family rather than retained by an authority. A guarantee adds another institutional layer because public funds provide the payment when the liable parent does not. These instruments should not be treated as interchangeable. In the Portuguese case, the central issue examined here is the income classification of a public guarantee in other means tests, rather than an empirically documented deduction from the FGADM payment itself. This literature already identifies substitution between maintenance and assistance. Accordingly, the article does not claim to discover a new general mechanism. Its more specific contribution concerns the legal completeness of a proposed Portuguese reform and the distributional implications of selecting a disregard based on the payer's identity.

2.3. Administrative Processes, Non-payment and Position of Both Parents

Moynihan et al. [7] conceptualise administrative burden through learning, compliance and psychological costs. These categories offer a useful lens for identifying possible obstacles between formal entitlement and payment: understanding a procedure, supplying information and dealing with uncertainty. Their application here is interpretive. The source report contains no interviews, time-use records, or claimant survey from which the magnitude of these costs could be estimated.

Finnström [8] examines more than 700 Swedish administrative court cases concerning disputed maintenance obligations. Parents' accounts prominently feature economic inability and involvement in children's care, while administrative assessments can diverge from their understanding of responsibility. The study cautions against equating every instance of non-payment with deliberate evasion. Its litigant sample and Swedish setting also limit direct transfer to Portugal. An evaluation should consequently distinguish the receiving household's protection from the liable parent's capacity to reimburse the state.

The United Kingdom Department for Work and Pensions [9], in prospective modelling of a collection-service reform, considers poverty movements in both receiving and paying households. This is a useful methodological reminder, not evidence of the effect of a Portuguese disregard. Payment reliability, benefit interactions and recovery practices are separate channels that may produce different consequences for different children.

2.4. Child-Centred Adequacy and Horizontal Equity

Article 27 of the Convention on the Rights of the Child links an adequate standard of living to parental responsibilities, state assistance and measures to secure maintenance [10]. It supplies a normative basis for examining whether institutional arrangements protect children's living conditions. It does not, by itself, prescribe a particular disregard or establish that every form of income assessment is incompatible with children's rights. Two evaluative principles follow. Adequacy asks whether the overall resources available to a child support a reasonable standard of living. Horizontal equity asks whether households with comparable needs and resources receive comparable treatment. A reform can improve adequacy for FGADM recipients while creating a difference between children receiving public and private maintenance. The strength of the policy case depends on recognising this tension and explaining the chosen boundary. The analytical framework therefore distinguishes access, retention and distribution. Access concerns who receives the guarantee and when. Retention concerns the share that remains after other benefits adjust. Distribution concerns which families gain from changing that share, and at what public cost. Administrative feasibility cuts across all three dimensions.

3 MATERIALS AND METHODS

3.1. Research Design and Evidence Base

The study is a qualitative documentary policy analysis, supplemented by transparent arithmetic illustrations. It follows the broad methodological rationale of treating documents as evidence requiring critical interpretation rather than as neutral descriptions of reality [11]. The starting document is the eighteen-page Portuguese report by Nunes and Monteiro [1], supplied for this analysis. Its narrative, figures, references, and proposed legislative amendment were read in full; relevant chart labels were also inspected visually. This article treats the report primarily as the source and origin of the policy proposal examined, rather than as representative empirical evidence of the prevalence or effects of benefit displacement in Portugal.

The documentary corpus was expanded through targeted web searches completed on 5 September 2026. Searches combined FGADM and the relevant statute numbers with terms for maintenance, means testing, single-parent poverty, benefit interactions and administrative burden. Priority was given to official legislation and social-security guidance for Portuguese institutional claims, and to publisher or university records for scholarly sources. The web retrieval cut-off was 5 September 2026. Searches combined FGADM and the relevant statute numbers with terms relating to maintenance, means testing, single-parent poverty, benefit interactions and administrative burden. Illustrative search strings included “Decreto Lei 70/2010 artigo 10 pensões alimentos 11,” “child maintenance poverty single mothers guaranteed maintenance comparative study,” “Moynihan Herd Harvey administrative burden,” and “Document Analysis as a Qualitative Research Method Bowen.” Searches were conducted through web retrieval; no subscription database search is claimed. References located within relevant studies informed further targeted retrieval. Document selection was purposive rather than exhaustive. Priority was given to

- i. primary Portuguese legislation and official administrative guidance for claims concerning institutional rules, eligibility and benefit treatment;
- ii. official statistical or administrative sources where available for quantitative context; and
- iii. peer-reviewed or institutional literature directly relevant to child maintenance, social assistance, single-parent poverty, benefit interactions or administrative burden.

Materials were not included in the substantive synthesis when they were duplicative, peripheral to the research question, or did not provide sufficient information to support the specific claim for which they were retrieved. This is a purposive narrative review, not a systematic review or a Scopus database search. There was no exhaustive database export, preregistered protocol, formal risk-of-bias scoring, or bibliometric analysis. When only an abstract or official summary was available, the synthesis was limited to the information provided there. The literature supports conceptual interpretation and comparison; it is not a substitute for Portuguese household-level evidence.

3.2. Analytical Procedure and Temporal Scope

The analysis separated descriptive context, operative rules, and normative proposals. Claims about entitlement and income treatment were checked against primary legal provisions and official guidance. The original proposal was then assessed for internal legislative consistency. Numerical statements were retained only where their units and provenance could be stated, while ambiguous comparisons were excluded. Finally, reform options were compared qualitatively using adequacy, horizontal equity, fiscal exposure and implementation requirements. Two time frames are kept distinct. The source report belongs to the 2024/2025 academic year and includes earlier statistics and a 2024 eligibility example. The legal update extends to the search date. Decree-Law No. 166/2026 was published on 13 August 2026 and entered into force on 14 August 2026, while its substantive provisions are scheduled to produce effects from 31 December 2026. Accordingly, this article treats the decree-law as enacted legislation but does not interpret its scheduled effects as evidence of implementation or observed outcomes.

Historical figures are not presented as current population estimates. No administrative microdata, individual court files, original survey observations, or interviews were available. No independent coding team or inter-coder reliability exercise was used. The findings consist of documentary observations, logical implications of specified rules, and clearly labelled policy proposals. They do not establish how many households lose benefits because of FGADM receipt.

3.3. Evidence Traceability and Analytical Boundaries

The evidence base was assessed according to the type of claim being made. The original Nunes and Monteiro report was treated as the source and origin of the disregard proposal rather than as representative empirical evidence. The single-parent household series was independently checked against the INE-derived PORDATA series, while the FGADM caseload figures were retained only as secondary descriptive context because the underlying administrative table could not be independently reconstructed. The historical eligibility example from the source report was treated as an arithmetic illustration using its stated 2024 assumptions.

Article 10(2) of Decree-Law No. 70/2010 directly supported the statutory classification of FGADM as maintenance, while the family-allowance and RSI guides provided programme-specific administrative corroboration. The study treated the 2026 Decree-Law No. 166/2026 as enacted legislation, but it did not interpret its scheduled effects as evidence of implementation or observed outcomes. Table 1 summarises the evidence sources, verification steps, and analytical boundaries used throughout the study.

Table 1. Evidence base and analytical boundaries.

Claim/analytical Element	Evidence used	Evidence status	Limitation
Origin of disregard proposal	Nunes and Monteiro report, pp. 15–16	Source proposal	Not enacted policy
Household-series verification	INE/PORDATA series and source report	Independently checked totals	One-unit differences in sex-specific components
Administrative caseload context	Source report, Fig. 4, p. 11	Secondary reproduction attributed to IGFSS	Underlying table not independently reconstructed
Historical threshold example	Source report, p. 10	Arithmetic illustration	Based on stated 2024 assumptions
FGADM classification as maintenance	Decree-Law No. 70/2010, Art. 10(2)	Direct statutory evidence	Applies within the relevant statutory framework
Benefit-specific corroboration	ISS family-allowance and RSI guides	Official administrative guidance	Programme-specific
Additional prospective classification	Decree-Law No. 166/2026, Arts. 15(2) and 63	Enacted rule	No implementation outcomes inferred
Income gains in Table 2	Equation and stated hypothetical inputs	Analytical scenario	Not observed household data

4 FINDINGS

4.1. What the Source Report Establishes—and Does Not Establish

The report identifies a concrete concern about coordination between maintenance guarantees and social assistance. However, its descriptive material does not show how prevalent that concern is or its causal consequences. For example, Fig. 2 reports single-parent household counts by sex. Such counts cannot establish the distribution of judicial custody decisions. They also do not show that every recorded family has a maintenance entitlement, an unpaid obligation, or a dependent child within the guarantee’s scope.

The same series reports 492,758 single-parent households in 2021, 398,334 in 2022 and 473,191 in 2023. These totals are independently reproduced in the INE-derived PORDATA series on single-parent private households [12]. The final year therefore exceeds 2022 but remains below 2021, so the three-year series does not support a continuous increase. The sex-specific components differ from the stated totals by one household in 2021 and 2023 in both the source report and the published INE/PORDATA series; these one-unit differences are retained as reported rather than interpreted. The figures are used only as contextual descriptive statistics and are not treated as estimates of FGADM eligibility, programme coverage or household need. Census family nuclei and Labour Force Survey household measures should likewise not be combined without reconciling definitions.

Fig. 4 of the source report reproduces administrative figures for FGADM, reporting maintained cases of 17,595 in 2021 and 12,476 in 2023, new awards of 3,606 and 2,797, and cessations of 5,353 and 5,440, respectively. The source report attributes these figures to IGFSS's 2023 activity reporting. Because the underlying administrative tables could not be independently reconstructed from an accessible primary dataset, the figures are retained only as reported descriptive context. They are not treated as independently verified estimates of programme caseload, coverage or demand. A reduction in maintained cases could reflect changes in eligibility, payment resumption, procedural exits or other administrative processes and cannot, by itself, establish reduced need or policy effectiveness. These limitations are consequential rather than cosmetic. A credible reform argument should rest on the operative interaction rules and an explicit evaluative rationale. Descriptive counts can motivate further investigation, but cannot supply the missing counterfactual.

4.2. FGADM Access and Treatment in Other Benefit Assessments

The FGADM framework connects unpaid maintenance, judicial intervention, and a household resource condition. Decree-Law No. 164/99 assigns payment administration to IGFSS and links assessment to the rules in Decree-Law No. 70/2010 [14]. The guarantee's own eligibility test is analytically distinct from what happens when another programme assesses a household already receiving FGADM. Law No. 75/98 also provides for annual confirmation of the conditions supporting payment, subrogation for recovery, and limits related to the maintenance award. Its amended Article 1(2) includes an exception to cessation at eighteen by reference to Article 1905(2) of the Civil Code; therefore, the source report's description of unconditional cessation at eighteen is incomplete [13]. These institutional features concern entitlement and continuity, not evidence of benefit displacement.

For context, the source report includes a 2024 eligibility illustration. This example concerns access to FGADM rather than the subsequent treatment of FGADM receipt in another benefit calculation. It illustrates access to FGADM, however, not the effect of receiving FGADM on another benefit. It is neither a current entitlement calculator nor a full annualised income assessment. Excluding an existing guarantee payment from another means test would not, by itself, remedy exclusion caused by earnings above the guarantee's own threshold.

4.3. Statutory Income Classification and the Proposed Amendment

The relevant classification is explicit. Article 10(1)(d) of Decree-Law No. 70/2010 classifies maintenance payments as pension income, while Article 10(2) expressly equates FGADM support and analogous payments with maintenance for that purpose. Article 11 separately defines social benefits and excludes specified family, disability and dependency benefits from that category. The statutory mechanism therefore operates principally through the Article 10 classification and its express FGADM equivalence rule, rather than through Article 11 alone [15]. This is stronger evidence of the mechanism than the original report's general discussion of social transfers. Official guidance corroborates its operation in specific programmes. The 2026 family-allowance guide lists FGADM payments among relevant pension income [16]. The RSI guide likewise includes them and describes RSI as the difference between the applicable household amount and assessable resources [17]. These examples support programme-specific interaction analysis, not a claim that every public benefit uses an identical calculation or withdrawal rate.

The source report proposes changes to Article 10(1)(d) and Article 11 to exclude FGADM payments from the income assessment used for other social benefits. As the source report describes, the proposal does not expressly address Article 10(2). This is material because Article 10(2) separately equates FGADM support with maintenance payments for the purposes of Article 10. Consequently, an amendment directed only at Article 10(1)(d) and Article 11 could leave the Article 10(2) equivalence rule intact. If the intended policy is to disregard FGADM payments in subsequent means-tested assessments, the legislative amendment should therefore state expressly how Article 10(2) is to operate. This is an assessment of the proposal's drafting completeness, not a judicial finding about an enacted reform.

4.4. Implications of the 2026 Reform for Income Assessment

Decree-Law No. 166/2026 [18] creates the prestação social única (PSU) and establishes its own income-assessment rules. Article 15(1)-(2) expressly treats maintenance as pension income and equates FGADM and analogous payments with maintenance for that purpose. The decree-law also amends Decree-Law No. 70/2010, but Article 53 changes Articles 12 and 22 rather than the Article 10 classification considered above; consequently, Article 10(2) remains relevant to the Decree-Law No. 70/2010 framework provisions that continue to apply. At the same time, Article 62 revokes the application of certain Decree-Law No. 70/2010 provisions to RSI, social unemployment benefit and social parentality from 31 December 2026. [18] The 2026 reform should therefore be understood as creating a transition across partially different assessment frameworks rather than as simply replacing the earlier rules. A future reform would need to address the relevant equivalence provisions in both frameworks, together with transition rules and administrative instructions. This analysis makes no claim about the number of affected PSU households or realised poverty effects, which cannot be inferred from the enactment.

4.5. Illustrative Household-Resource Scenarios

The following model is an analytical illustration, not a replication of Portuguese entitlement rules. Let Y denote other monthly resources, G a guarantee payment, B the amount of one other benefit before maintenance-related adjustment, t the withdrawal rate applied to assessable maintenance, and d the proportion disregarded. With all other eligibility conditions held fixed:

$$D(d) = Y + G + \max\{0, B - t(1 - d)G\} \quad (1)$$

where D is the cash total in this simplified model. The resources present before receipt of the guarantee are $D_o = Y + B$. Define the net retention ratio as

$$R(d) = [D(d) - D_o]/G, \text{ for } G > 0 \quad (2)$$

The ratio measures what remains of the new payment after the modelled benefit adjustment. It is not a poverty rate or a programme-efficiency estimate. In this article, $R(d)$ is used only as a conceptual measure for the hypothetical scenarios in Table 2; it is not estimated from observed household or administrative data.

Table 2. Illustrative household-resource outcomes under alternative benefit-adjustment rules (€).

Scenario	Y	G	B	t	d	Other benefit after adjustment	D(d)	Gain over D_o
Full assessment	300	150	250	1.00	0.00	100	550	0
Half disregarded	300	150	250	1.00	0.50	175	625	75
Fully disregarded	300	150	250	1.00	1.00	250	700	150
Half-rate withdrawal	300	150	250	0.50	0.00	175	625	75
Limited benefit available to withdraw	300	150	50	1.00	0.00	0	450	100

Source: Authors' calculations based on the stated analytical model. All parameter values and household-resource amounts are hypothetical and do not represent observed Portuguese households or programme outcomes.

In the first row, the guarantee displaces an equal amount of the other benefit, so the cash total does not rise. Full disregard preserves the whole payment in this model. The final row shows why full assessment does not always imply complete displacement: once the other benefit reaches zero, there is no further amount to withdraw. A separate threshold-based benefit could instead create a discontinuous loss, which this linear example does not simulate. The calculations establish a conditional mechanism only. They do not show that all FGADM recipients experience full withdrawal, that combined losses occur at the same time, or that every euro retained moves a household across a poverty threshold. Actual estimates require programme-specific income definitions, assessment periods and linked household information.

5 REFORM OPTIONS AND IMPLEMENTATION CONSIDERATIONS

5.1. Comparison of Reform Options

The original report's full exclusion is one possible response, not the only one. Table 3 compares it with alternatives. All expected effects are conditional design implications rather than measured Portuguese outcomes. The strongest argument for a full FGADM disregard is that a child should retain the value of the state's response to a failed maintenance obligation. The strongest objection is horizontal equity. A hypothetical comparison illustrates the horizontal-equity issue. Consider two otherwise identical households receiving €150: one from a liable parent and one from the fund. A disregard limited to the latter changes benefit entitlement according to the payer, although the child's current cash receipt is equal. A justification based on prior instability is possible, but must be stated and assessed rather than presumed. This example identifies a distributional question for policy design; it does not measure differential treatment among Portuguese households.

A common capped disregard would protect a defined amount of maintenance regardless of source. It could avoid that particular distinction but would require choices about the cap, the number of children covered, irregular receipts, and indexation. It would also extend beyond the original proposal and might cost more. A general child-income floor would address children without a maintenance entitlement, although it represents a substantially broader reform. The available evidence cannot identify an optimal option. It does justify comparing alternatives through the same household-resource framework. Evaluate fiscal restraint transparently against adequacy and distribution, rather than infer it from a reduction in one programme's caseload.

Table 3. Reform options for treating maintenance-related payments in means tests.

Reform Option	Adequacy	Horizontal Equity	Fiscal Exposure	Implementation Requirements	Main Policy Trade-off
Retain current assessment rules	Lower incremental protection where FGADM is treated as income in means-tested assessments	Relatively strong consistency with the treatment of maintenance received privately	Lower additional fiscal exposure	Low; uses existing assessment framework	Administrative simplicity and fiscal control may come at the cost of reduced incremental protection
Full disregard of FGADM payments	Higher protection for households receiving FGADM	May create different treatment between public FGADM payments and comparable private maintenance	Higher	Moderate; requires amendment of assessment rules	Stronger protection for FGADM recipients but potentially weaker neutrality across maintenance sources
Capped disregard for maintenance-related payments	Targeted improvement in disposable resources up to the specified cap	Potentially stronger neutrality across comparable maintenance sources	Moderate and controllable through the cap	Moderate; requires definition and administration of the cap	Balances protection and fiscal control but introduces a design threshold
Partial disregard or coordinated taper	Partial protection while preserving some income sensitivity	Potentially balanced treatment across income ranges	Moderate, depending on the taper	Moderate to high; requires coordinated calculation rules	Can reduce abrupt benefit withdrawal but increases administrative complexity
Broader child-income floor or protected amount	Broader protection of resources available for children	Potentially broader horizontal protection across household types	Potentially higher, depending on coverage and level	High; may require wider changes to assessment rules	Stronger child-income protection but greater fiscal and implementation implications

5.2. A Coherent Reform Specification

Any chosen disregard should specify its scope across eligibility and award calculations. An exemption that prevents refusal of a benefit but still allows its amount to fall would protect access without necessarily protecting income. The reform should also define whether it covers only FGADM, analogous guarantees, private maintenance, or a common protected amount for all relevant payments. Legislative drafting must reconcile the specific equivalence provisions identified above, generic income categories and each programme's special rules. The necessary exercise is a provision-by-provision concordance, including the transition to PSU. The article proposes this approach rather than presenting English wording as an enactable Portuguese legal amendment.

Timing rules require equal attention. Monthly payments, delayed payments, and arrears can affect resources differently. A protected amount needs a defined assessment period, correction rules, and a procedure for changing the payment source. Otherwise, apparently identical awards could produce different outcomes according to processing dates. These are foreseeable design questions; their frequency in Portuguese practice is not measured here.

5.3. The Role of Intermediate Public Managers

Based on the documentary and legal analysis, the following implementation measures are proposed; they should not be interpreted as findings about observed administrative deficiencies. Intermediate managers can translate a legally authorised reform into consistent procedures. Useful tasks include mapping the claimant journey, identifying where income classifications enter benefit calculations, preparing worked examples for staff, and checking that revised instructions agree across teams. Managers cannot create a disregard through discretionary practice when the governing rule requires inclusion.

A practical implementation package would combine a dated rule register, a decision guide and test cases covering stable payments, interrupted payments, changes in household composition and moves between public and private maintenance. Automated calculations should retain an intelligible explanation of which receipts were counted and why. Claimants need a way to correct inaccurate information, especially when records transfer between organisations. Administrative monitoring should distinguish payment timeliness, renewal interruptions and calculation errors from deliberate misreporting. A high number of completed files alone says little about whether children receive reliable support. This follows from applying the administrative-burden perspective to programme design, not from an observed assessment of staff performance.

6 DISCUSSION AND EVALUATION AGENDA

6.1. Evidence Required to Evaluate the Reform

The following designs are proposed for a future empirical evaluation agenda and were not implemented in this documentary analysis. The immediate research priority is to estimate displacement among actual recipients. An appropriately authorised linkage of payment and benefit records would identify the guarantee amount, the other benefits held before and after receipt, the income used for assessment and the timing of recalculation. Household composition and earnings changes are necessary to separate maintenance-related adjustments from unrelated changes in circumstances. A static microsimulation could then apply alternative disregard rules to the same observed households. It should preserve programme-specific definitions rather than impose a single generic household scale. Core outcomes would include disposable income, poverty gaps, gains by income group and child count, and gross expenditure changes. The model should report households gaining nothing as well as average gains. Sensitivity analysis should vary payment regularity, take-up and the treatment of multiple benefits.

Budget estimates should include the additional payments in affected programmes, possible changes in FGADM uptake, implementation costs and recovery receipts. They should not assume that administrative savings or future improvements in employment offset expenditure without evidence. A reform affecting the distribution of private maintenance would also require attention to paying households; its resource implications differ from those of a public disregard alone. An ex-post evaluation could use longitudinal comparisons if implementation creates a defensible comparison group. A before-and-after change alone would be insufficient, particularly amid broader welfare reform. Difference-in-differences would require plausible parallel trends and limited contamination of the comparison group. Threshold designs would require continuity assumptions and scrutiny of income measurement. None of these designs has been implemented in this article.

6.2. Implications for Social-Policy Research

The Portuguese case illustrates why a transfer's public character does not guarantee it supplements the household's other support. Its policy function and its accounting classification can point in different directions. The specific documentary contribution is to connect that observation to an explicit equivalence clause, show why the original proposed amendment leaves a potential drafting gap, and recognise a parallel provision in a newly enacted framework.

The distinction between access and retention also sharpens policy diagnosis. A household rejected because its assessed resources exceed the guarantee's threshold faces a different problem from a recipient whose other benefit falls. Increasing the disregard in the second setting does not automatically help the first. A reform that combines both objectives needs separate instruments and separately reported effects. Horizontal equity extends the analysis beyond a simple recommendation to exclude a payment. It asks whether the child's need, the maintenance amount, the reliability of receipt, or the payer's identity should determine preferential treatment. This question does not invalidate a targeted FGADM reform. It identifies a choice that should be explicit before the proposal is assessed as fair or sufficient.

6.3. Limitations

The analysis relies on a small, purposively selected documentary corpus. The underlying training report is valuable as the origin of the proposal but is not a representative empirical study. Its administrative figures were not independently reconstructed, and several statistical interpretations required qualification. The literature review is selective, and the numerical examples are hypothetical. Neither administrative delays nor claimant experiences were directly measured. Legal text and guidance establish formal rules more readily than implementation. There may be programme-specific exceptions or practices outside the selected material. The enacted PSU provisions are considered prospectively; their implementation could require renewed examination. International evidence supports comparison of mechanisms but does not establish Portuguese effect sizes. These limits warrant describing the output as a policy analysis with an empirical research agenda, rather than an impact evaluation.

7 CONCLUSION

The FGADM proposal raises a coordination question: how much of a maintenance guarantee remains available to a household after other benefits are assessed? The documentary evidence supports examining this interaction and identifies a potential drafting gap in the source report's proposed amendment. It does not establish the prevalence or magnitude of benefit displacement among Portuguese households. A coherent reform therefore needs to address the relevant equivalence provisions in the applicable assessment frameworks, programme-specific rules, and the transition to the enacted 2026 framework, whose relevant substantive effects are scheduled for 31 December 2026. The article's illustrations show conditional resource effects, not measured poverty reduction. Full disregard, partial protection and a common maintenance allowance offer different combinations of adequacy, equity and expenditure. Their comparison requires household-level evidence. The practical priority is therefore to align legal design, administrative assessment and future evaluation around the resources that children's households actually retain.

DATA AVAILABILITY

No individual-level dataset was collected or generated. The documentary sources are identified in the references. Table 2 reports the hypothetical inputs and analytical equation required to reproduce the illustrative calculations. Access to the unpublished source report remains subject to its authors' permission.

ETHICS STATEMENT

This study is based exclusively on documentary analysis of a supplied public-administration training report, published legislation, official administrative guidance and publicly available research. It involved no human-participant recruitment, interviews, surveys, individual administrative records, or identifiable personal data. Institutional ethics approval was therefore not required under the applicable institutional requirements.

USE OF GENERATIVE ARTIFICIAL INTELLIGENCE

ChatGPT (OpenAI) assisted with analyzing the supplied report, discovering sources, structuring articles, drafting and editing in English, and preparing the illustrative calculations. The authors independently checked all substantive claims, legal provisions, references, numerical inputs, and calculations against the underlying sources. Generative AI was not treated as an evidentiary source and was not used to generate empirical data or reported research findings. The authors take full responsibility for the accuracy, interpretation, and final content of the manuscript.

AUTHORSHIP AND CONTRIBUTIONS

The manuscript authors are Maria Rita Nunes, Olga Monteiro and Alvaro Rocha, in the order shown above. The original training report was written by Maria Rita Ferreira Nunes and Olga Maria Mendes Da Silva Monteiro.

STATEMENT OF CONFLICT OF INTERESTS

The authors declare no conflicts of interest related to this study.

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LICENSING

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