

UNPAID WORK IN THE GLOBAL ECONOMY

María Ángeles Durán Heras

Fundación **BBVA**



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* <http://www.fbbva.es/TLFU/tlfu/ing/publicaciones/documentos/index.jsp>

collection, but together they form a part of an entire work in which they are mutually complementary. Marga Suazo has been an essential piece of the project, as head of the back office and of the communications between the members of the team. Finally, I would like to thank hundreds of people whom I cannot cite individually, for their comments; they have encouraged me to continue studying the economics of care over a period of five years.

These pages are dedicated in particular to non-remunerated carers of children and the sick, although few will read them because they are too busy in their own absorbing job of caring. However, I hope that this book will make a contribution to making their voices heard, and to making their enormous contribution to our collective welfare throughout the world more visible.

Introduction

THIS work was begun formally in 2006, but in fact it could be said that it really began in 1971. The act of discovering that there was not even one single empirical source available in Spain on non-remunerated work compelled me to narrow my research goals from the work of women to paid work, the only aspect on which the Working Population Survey and other periodic statistics threw any light. In 1975, while there was still a total lack of sources, I had the opportunity to attend the United Nations Conference (Mexico 1975) on the occasion of the announcement of the United Nations International Women's Year, and I was able to confirm, on the ground, the urgent need for new points of view on remunerated work throughout the world. Since then I have not paused in my attempt to remedy that initial defeat. From the sociology of health to social inequality, by way of sociological theory or town planning, non-remunerated work has always had a place in my research, even if it was merely to put on record that it was there, or in order to underline the poverty and bias of social and economic points of view which do not take it into account.

Fortunately, the vacuum of four decades ago has given way to a rich international current, still a minority but swelling fast, which includes non-remunerated work and care as a basic research topic and highlights its profound social, political, economic, and ethical implications. As regards extensive direct observation, time use surveys have become popular, and have become a significant source of statistics. As in all areas of research, this has now become an international field in which information flows fast and intercontinental discussions often take place in real time.

What differentiates this research work from previous studies is the breadth of its scope in terms of observation and reflection. Although references to Spain are frequent, because this is the social environment which is known best by the researchers who took part, what we are looking at is non-remunerated work in the global economy, both

at the present moment and in the short and medium terms. For this reason, we have worked exhaustively with international sources, in particular with the demographic estimates of the United Nations for the period from 1950 to 2050 which were published in *World Population Prospects*, 2008 and 2009 edition. If the title used is *global* and not *world-wide*, that is specifically in order to highlight the growing interdependence between society and the economy in every corner of the world.

The book has three principal objectives. The first is to present and discuss concepts, to offer an innovative view of the role played by non-remunerated work in the production of wealth and welfare in all countries, and also of the international nexus between remunerated work and non-remunerated work through migration and remittances. The second objective is to compare the concepts referred to in the preceding objective with the available empirical sources. An extensive and intensive search has been made of the international sources, a task which has at one and the same time both considerably complicated and enriched the analysis; the variety of sources is inevitably accompanied by a disparity of criteria, definitions, time horizons, and reference populations. It would have been simpler merely to restrict ourselves to one or two principal sources, but the richness of the more than one hundred statistical sources used constitutes a decisive contribution, and the benefit of this diversity outweighs the cost of the intensive labour required to include them, many times over. The third objective, at a lower level than these, is to create awareness of some sources which have yet to be published or which have not been very widely circulated, principally research projects carried out by the “*Time and Society*” Research Group at the CSIC. These include the “*Survey on Time for Care 2009*”, and other surveys from previous projects which have obtained finance in R&D programmes. The goal of reaching a balance between what might be called *visionary components* and *calculated components* has been the guiding principle of the research ever since it began. Since the first of the two is essential, an attempt has been made to ensure that the second, the empirical contribution, matches it in terms of the effort devoted to it and the results obtained, even though more attention has been paid to covering virtually untouched fields than to sophisticated processing of the scarce information available.

The work is divided into eight chapters. In the first chapter, the conceptual limits between work and employment are established, and the unequal distribution around the world is empirically underlined. The chapter covers the borderline area between employment, unemployment, not being in employment, and hidden or informal work in detail. The chapter closes with some thoughts on the future and on the manner in which new types of workers will reconcile their multiple roles, together with the changes which will be necessary in the social or union organisations which represent them.

The second chapter focuses on the organisational units in which the greater proportion of non-remunerated work takes place in the world; there are more than two thousand million households, or workshops, which are producing services without interruption in order to attend to the needs of the people living in them. The study examines the emotional and social support networks which underpin households, together with the material conditions (the housing, the facilities) under which the occupants live together.

The third chapter constitutes a critical review of the System of National Accounts, and especially of GDP. For this review, a general theoretical approach is used in conjunction with a more concrete and empirically documented approach in respect of the barriers between households and the market: on the one hand, households have a limit to their acquisition of goods in the market, and on the other hand, the market is incapable of absorbing the potential productive resources which households offer. The interactions which have arisen between households, the market, and the State in Spain during the current economic crisis are dealt with in particular detail.

Chapter four poses the question of the degree of liberty or coercion with which non-remunerated work is taken up on an individual basis. Given that time is a limited resource, the use of time in self-maintenance and care for others reduces the opportunity to take on employment, education, and other activities. A socio-economic perspective of motherhood is presented (paid leave, risk of death), as are expectations of aging, of the mismatch between supply and demand in respect of carers, and of the preferred options in the event of dependence.

Chapter five offers a proposal, which it is hoped will be taken up and continued by other researchers, for innovation in the System of

National Accounts. Taking the Spanish labour market as a starting point, in this chapter we explore the possible shapes of solutions to the most difficult of all of the challenges posed by satellite accounts for non-remunerated work, that of assigning it a value or a price. The costs of the substitution of care for children and the sick by paid workers are analysed, together with the opportunity cost this involves for carers in being taken out of the job market. As a corollary, the chapter notes a trend towards the displacement of the cost of care to a new type of worker who is outside the job market, a group which is made up of elderly women who have no social protection and on whom an increasing workload is being placed in terms of care.

In chapter six we introduce the question of the geographical mobility of workers and the international transfer of non-remunerated work to become remunerated work or services consumed by households, which in turn makes it possible to transform non-remunerated domestic work into remunerated work. An analysis is made of the role of remittances and their contribution to alleviating the deficiencies in care arising through emigration in workers' places of origin.

Chapter seven is wholly devoted to paid domestic work, a matter which the International Labour Organisation considers to be a priority. In many developing countries, it is this type of work which absorbs the greatest section of the female workforce. It is analysed from three points of view: that of the labour organisations, that of the employing households, and that of the labour market.

The final chapter, chapter eight, opens up a consideration of the future towards the horizon of 2050. Using indicators based upon population ratios in order to produce estimates of dependence, new and more complex scales are proposed which can give a weighting to the composition by age groups in the dependent population. In this chapter we demonstrate the Madrid, Santiago de Chile, and other scales, and point out their possibilities and their methodological differences. By applying these scales to the demographic estimates of the United Nations, we offer indicators for the demand for care in all of the major regions of the world, and also in a selection of countries, and in the specific cases of those countries with the highest and the lowest levels of development. Finally, we present a series of scenarios for the distribution of the workload involved in care between various different groups in the population and social institutions.

1. The boundaries between work and employment

1.1. Work is not synonymous with employment

Work is not the same as employment. The concept of ‘work’ encompasses a very wide range of activities and employment is only one of them. According to the first entry in the Dictionary of the Royal Spanish Language Academy (RAE 2011), *work* is “to be engaged in any physical or intellectual activity”. Although the first entry does not require it, the second entry defines it as a “paid occupation”. The dictionary also offers other definitions to it which compare it to hardship, trouble, torment or an unhappy occurrence (9th entry). It is also defined as “human effort applied to the production of wealth, as opposed to capital”. The RAE defines *employment*, however, as having an “occupation or trade”, and *labour* as “that which pertains or relates to the economic, legal and social aspects of work”¹.

The boundary between work and employment is not a linguistic matter, but rather, and above all, a political matter, because the workers’ statute is associated with some of the most important social and economic rights and obligations. In Spain, labour law, as enshrined in the Workers’ Statute², applies only to a small part of what

¹ The etymological analysis of the word “*trabajo*” (“work” in Spanish) reveals important ideological features which could pass unnoticed; the Latin word “*tripalium*”, from which the word *trabajo* is derived, was a three pronged instrument of torture. “*Labor*” was the Latin word for the finishing which added beauty and increased the value of textiles, a task generally performed by women. And the *Oxford Dictionary* includes the painful and risky act of giving birth as one of the meanings of “*labour*”.

² Royal Decree Law, Consolidated Text 1/1995, of 24 March.

might be considered as work. Many workers who carry out other types of work are excluded because they are not governed by these rules:

- a) Unpaid work.
- b) Forced labour.
- c) The work carried out by unwaged family members who live with a businessperson.
- d) Self-employed work.
- e) Independent work.
- f) Some special types of work that are regulated by internal rules (civil servants, etc.).

1.2. Distribution of work in the global economy

The subject of this study is not paid work, for which there is a wide range of literature, but rather unpaid work. The vision we offer of employment worldwide is only intended as a reference for comparison purposes, in order to clarify that paid work is heterogeneous in terms of its internal breakdown, that salaried work is predominant in developed countries while it is in the minority in developing countries, that the proportion of women in employment is extremely varied, and that there is a lack of statistical sources on unpaid work and employment, especially in developing countries.

It is not known with any accuracy how work is distributed worldwide and we cannot be sure how many paid workers there are, or how many unpaid workers are salaried or self-employed. Even less is known about the amount of hours worked annually, the conditions in which the work is carried out and the pay received, or indeed how many people work without remuneration.

Censuses are the basic statistical source in all countries around the world but in some countries this information is not available on a regular basis. Although censuses do not provide information about how time is employed, they do provide information on the main activity a person carries out, which indirectly gives an insight into how each worker uses their time. Nevertheless, the way population is divided into active and non-active requires a prior definition

of what is understood as activity. How much time must be spent on paid work in order for a person to be considered active/employed or not? Censuses pose the same basic difficulties in identifying work as Labour Force Surveys. These difficulties are more pronounced in developing countries because of the scarcity of statistical sources beyond censuses (Acharya 2005, 11).

The best available estimates on work in the labour market are those produced by the United Nations, which are used by almost all organisations. The International Labour Organization (ILO) compiles basic information and documentation on employment and makes it accessible through its database. However, if one consults Laborsta (Labour Statistics Database), it is clear that there is an enormous dearth of information on large areas of the world in which no surveys are carried out periodically on the workforce, and where, on occasion, there are no reliable and up-to-date censuses³. The United Nations, which uses the most reliable demographic data, estimates in its *Millennium Development Goals Report 2010* that workers make up 60.4% of the global population (United Nations 2010, 3). These estimates refer to the global population since the “potentially active population” criterion, i.e., those between 15 and 65 years of age, cannot be readily applied to countries in which very young people work for their family in agriculture or where there is no real retirement age for the elderly. The lowest population to number of workers ratio is found in West Africa (44.3) and the highest is in East Asia (69.9), while Latin America and the Caribbean stand close to the worldwide average and the developed regions are five points below average (Table 1.1). From 2000 to 2009, the global ratio decreased by 0.8, owing principally to changes in the age breakdown of the population. The ratio only increased in a few regions due to a younger population and as a consequence of an increase of women in employment. If between 44.3% and 69.9% of the global population are employed, how much of the remaining population work without being employed? How many people deemed employed workers also do other, unpaid work?

³ For example, there are only seven countries in Africa which are included in the Laborsta database: Algeria, Egypt, Mauritius, Morocco, Saint Helena, South Africa, and Tunisia.

TABLE 1.1: The proportion between those working and the total population, 1991-2009, by gender
(percentage)

	Those in work as a proportion of the total population			2009		
	1991	2000	2009	Men	Women	Young people
World	62.2	61.2	60.4	72.8	48.0	44.3
Developing Regions	64.2	62.9	61.7	75.5	47.8	45.0
North Africa	43.9	43.4	46.0	70.1	22.2	29.4
Sub-Saharan Africa	63.5	64.1	64.9	74.5	55.5	49.0
Latin America and the Caribbean	56.3	57.9	60.0	74.3	46.5	43.6
East Asia	74.5	73.1	69.8	75.4	64.0	53.9
South Asia	57.6	56.0	55.4	77.2	32.5	41.2
West Asia	68.0	66.5	65.6	77.6	53.9	43.6
Western Asia	48.6	46.4	44.3	66.4	20.4	26.0
Oceania	65.5	66.3	66.8	71.2	62.4	52.8
Community of Independent States (CIS)	57.9	54.0	56.9	62.9	51.8	34.9
CIS Asia	57.4	55.7	59.3	65.6	53.4	38.6
CIS Europe	58.0	53.6	56.1	61.9	51.3	32.8
Developed regions	56.5	56.5	55.3	62.9	48.1	41.0
Transitional countries in South East Europe	53.4	51.9	47.7	55.0	40.8	24.0
Less-developed countries (LDC)	70.7	69.3	69.0	79.3	58.9	55.9
Land-locked developing countries (LLDC)	66.1	66.0	68.3	76.6	60.4	55.0
Small islands in development (SID)	54.8	56.6	57.7	69.8	45.8	43.0

Source: United Nations (2010c).

If the ratio of 60.4 applies to the total population, as estimated by the UN's World Population Prospects for 2010 (the global population standing at 6,909 million), the number of occupied workers could be estimated at 4,176 million people (UN 2010).

Despite the general opinion in developed countries, self-employed people workers working for an employer are in the minority. Of the occupied workers, the United Nations (UN) estimates that globally, more than half (50.6%) are self-employed or help their families. This proportion is higher for women (52.3%) than for men (49.4%). In developed regions, the proportion of self-employed or independent contractors/freelance is only 9.1% because there is a large number of medium and large-sized corporations as well as public sector employment; conversely, in less developed countries 87.7% are either self-employed or work for their family.

Various studies carried out by the ECLAC have shown that more women than men work in low productivity sectors; within these sectors, women's salaries are much lower than those of men. The lack of time for themselves due to starting unpaid work at an early age is one of the reasons for this inequality (Grynspan 2005, 15).

The general worldwide trend has been one of a decrease in the self-employment characteristic of subsistence farming and small businesses. Over the last two decades, the global percentage has decreased by five points, with the figure for women being particularly marked, almost seven points lower, which is more than 10% lower than its starting point. The trend has been continuous, except in the countries of the former Soviet Union where there was a return to self-employment in the years up to 2000. However, this was only temporary and it later reverted back to the general trend. The proportion of women in non-agricultural wage employment is very heterogeneous; almost half in developed regions (46.8%) and higher still in the CIS (Community of Independent States)⁴, but accounting for only 20% in North Africa, East Asia and South Asia. Applying the abovementioned ratio to the number of occupied workers, it can be estimated that there are 2,061 million salaried workers and 2,111 million self-employed/independent contractors and family workers.

As with all major indicators, employment figures mask profound differences between regions and countries, as well as between regions of the same country and social groups. Nevertheless, the trend towards salaried work is evident on a regional and global scale.

⁴ Composed principally of republics which were formerly part of the Soviet Union.

Salaried work is seen by many analysts as a positive trend because it represents a step towards abandoning the informal subsistence economy, along with improving the likelihood of obtaining social benefits for the worker and their family. However, this perspective is not shared by all analysts. In developed nations, where there are many small- and medium-sized enterprises, as well as independent qualified professionals, the notion that being self-employed is more highly valued than being employed is deeply rooted.

On the other hand, although the increase in the number of people employed in an economy raises its total GDP, this does not automatically imply that GDP increases per person employed, since it can decrease if new jobs are below the previous average. Table 1.2 shows that the change in GDP per capita in dollars was constant between 1998 and 2009. Globally, GDP per person employed grew by 21.3%. The rate of growth during this period was very diverse; there was a decrease of GDP per capita in Oceania, growth of 5% in Latin America and the Caribbean, 14% in developed regions and 35% in Southeast Asia.

By comparison with remunerated work, there is a greater volume of non-remunerated work and it is more heterogeneous and much less understood. There is no difficulty in delimiting it from salaried work, but as has already been pointed out, for the moment self-employment is much more common than employed work, and the boundary between self-employment and non-remunerated work is permeable. If the absence of sources means that estimates of remunerated work can only be guessed at in the greater part of the less developed world, in the case of non-remunerated work the poverty of basic research is for the moment of such a calibre that it even extends to the more developed countries, of which barely half a dozen yet have a number of comparable surveys which include extensive information about this topic.

Graph 1.1⁵ shows the worldwide dependence rates for 2010, 2025, and 2050, *dependence* being understood to refer to the number of persons less than 15 years of age and above 65 years of age in proportion to the number of persons between 15 and 65 years of

⁵ This graph was prepared by Díaz and Llorente (2012), in the monographic study and which has simultaneously been published as a working paper.

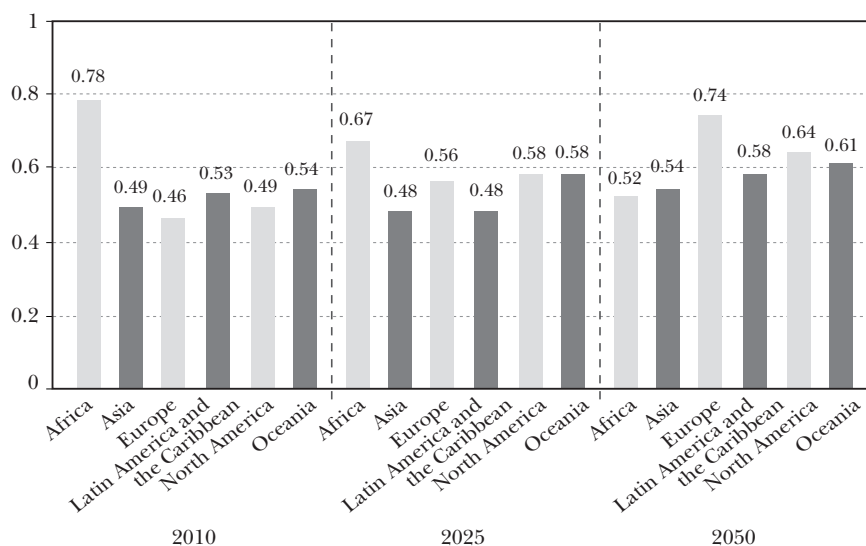
TABLE 1.2: GDP per person employed, 1998-2009
(in constant Dollars)

	GDP per person employed		percentage B/A
	A 1998	B 2009	
World	17,457	21,172	121.3
Developing Regions	7,816	11,559	147.9
North Africa	15,806	18,368	116.2
Sub-Saharan Africa	4,381	5,135	117.2
Latin America and the Caribbean	21,170	22,214	104.9
East Asia	5,370	11,952	222.6
South Asia	5,030	7,794	155.0
South East Asia	6,744	9,089	134.8
Western Asia	33,084	39,559	119.6
Oceania	5,954	5,564	93.4
Community of Independent States (CIS)	12,875	21,181	164.5
CIS Asia	6,453	11,886	184.2
CIS Europe	14,695	24,399	166.0
Developed regions	61,156	69,841	114.2
Transitional countries in South East Europe	15,490	25,150	162.4
Less-developed countries (LDC)	2,062	2,974	144.2
Land-locked developing countries (LLDC)	3,519	4,828	137.2
Small islands in development (SID)	20,926	23,846	114.0

Source: Prepared by M.A. Durán using data from the United Nations. *The Development Goals Report 2010*, Statistical Annex, p. 3, no. 1.4.b.

age (Díaz y Llorente 2012). This is not a direct indicator of non-remunerated work devoted to care, but it does provide the best possible approximation on a worldwide level.

Since time is a scarce resource, the time devoted to caring cannot simultaneously be used for employment, and many countries will have to choose between these two alternatives.

GRAPH 1.1: Dependence rates. Geographical distribution

Source: Díaz and Llorente (2012). Prepared by the authors using data from the International Labour Organisation, *Global employment trends for women: March 2009*.

If it is measured in hours worked, there is a greater volume of non-remunerated work than of remunerated work on a global scale, although this statement must be qualified by an exact definition of what is to be understood by work, particularly in the case of care work. The greater volume is due to the intense participation of the female population throughout the world, and above all in the less developed areas and in the sectors of society with the least resources (Table 1.3). Unlike employed work, non-remunerated work is done on public holidays, it is done in the hours before and after work, and it is done by retired people and pensioners, and in many cases by children, the elderly, and the sick. According to a report sponsored by the United Nations Development Programme, and carried out by the Institute of Political Studies of Paris (UNDP 2005)⁶, the data

⁶This was carried out in Benin, Mexico, and India. The authors of the annex on Benin were Gabriel Brunnich and Anne-Laure Radas. The authors of the annex on India were Mehdi Ghissassi, Mercedes Johnson, and Camille de Sentenec. The authors of the annex on Mexico were Pippa Druce and Pilar Rodríguez Riccheri.

TABLE 1.3: Number of workers by gender in certain African countries, around 2008
(in thousands)

Country	Africa		
	Total	Men	Women
Algeria	9,146.0	7,718.0	1,428.0
Egypt	22,506.0	18,041.0	4,465.0
Mauritius	543.0	355.0	187.0
Morocco	10,189.3	7,453.5	2,735.8
Saint Helena	2,130.0	1,174.0	956.0
South Africa	13,713.0	7,612.0	6,041.0
Tunisia	3,155.4	–	–

Source: ILO, Laborsta Internet, 2010.

presented by traditional statistics underestimate the real work done by men and women because they do not include non-remunerated work. If it is included, the total work time of women becomes equal to, or even exceeds, that of men. For example, in Benin, it exceeds the average work time of men by 43%, both in rural areas and in urban areas. Because they accumulate remunerated and non-remunerated work, women and girls have less time for schooling and for leisure, particularly in rural areas (UNDP 2005, 5). Non-remunerated work contributes to social cohesion more than any other public policy programme. Therefore, achievements in social cohesion cannot be restricted to gaining employment in production, while forgetting the key role played by families, and in particular by women within the family, in the production of social welfare (FIIAPP 2010, 11).

Just as for remunerated work, non-remunerated work is heterogeneous in its internal composition: We find classified under this heading, everything from the hard and painful work in households which lack the minimum material infrastructure (drinking water, energy, sanitary water and sewage network) to the work of wealth management and social representation which is carried out in the households of the well-to-do classes. As has already been indicated, non-remunerated work is still a “terra incognita”, an invisible conti-

nent which has to date been little explored, but without which neither traditional societies, nor modern societies can be understood.

1.3. Ideology and Statistics: the contribution of Labour Force Surveys to making work invisible

The principal means for getting to know the conditions and evolution of employment throughout the world are the Labour Force Surveys (LFS)⁷. Although the LFS are apparently a simple statistical instrument, the contribution they make to the creation of ideology is considerable. Paradoxically, although this is not their intention, the best source of worldwide information about work is also a formidable source for rendering invisible those forms of work which do not fit a restrictive definition of work. The LFS has become an indirect agent for the creation of opinion in that it puts people who do not have a direct personal relationship with the labour market into the category of those without work, or inactive, regardless of the social usefulness of their work. Everyone over the age of 16 years old has been classified in accordance with the view that this macro-survey imposes upon the world of work, by segmenting it into eight categories:

1. Those in work.
2. Those not in work, the unemployed (available and seeking work).
3. Students.
4. Pensioners, or those who have retired from work.
5. The permanently disabled.
6. Those devoted to household tasks.
7. Those who carry out social work and charitable activities without remuneration.
8. Other.

Each category is assigned on the basis of the information collected by the LFS in respect of the preceding year, adjusted and

⁷ The Spanish National Institute of Statistics (Instituto Nacional de Estadística - INE) translates EPA into English as EAPS, Economically Active Population Survey.

complemented by the information with reference to the week before the survey, which introduces a number of variations. With respect to the “unemployed”, the LFS restricts this identification to those who are “seeking work”. It boosts the category of “students” by adding that these are identified as such “even if they are on vacation”. With respect to the “retired” or those “who have left work”, it introduces a significant conceptual change in comparison with other groups, because it does not define them by their social and employment status but by their economic situation, by making them “those who receive some retirement or early retirement income”. Furthermore, it adds a new category, which is that of those who “receive a pension other than a retirement or early retirement pension”.

The truth is that the principal objective of the LFS is not work but, as is pointed out in its introduction and conceptual framework, the “employment status of those interviewed”, and “their relationship with economic activity”. The delimitation of the boundaries between work and non-work is at times difficult, and the LFS devotes a considerable methodological effort to two criteria: that of “remuneration”, and that of the “cessation of activity”. In the methodological introduction, it investigates whether it is work when one receives a payment or economic benefit (point B₂) and whether it is non-remunerated work when it is carried out in the company or business of a family member one lives with (point B₃). It also tries to elucidate as to whether workers who are not working receive income from their employment and estimates the amount in proportional terms.

The existence of such a formidable instrument of observation as the LFS has cast other forms of work which are not examined by the survey into the shadows. Furthermore, it has an extraordinary capacity to grant symbolic existence to its subjects. To give an example, in order to earn the status of “worker” according to the survey, it is only necessary to have devoted one hour to the activity defined as such during the preceding week. If such capacity for identification were to be applied to performing other activities, virtually the entire adult population could be identified as holding the status of “non-remunerated domestic worker”, and a sizeable proportion should similarly be considered to be “students”.

It is not only in the Labour Force Survey that the predominant visibility granted to remunerated work arises. The majority of research

studies adopt remunerated work as the principal perspective on occupational activity, thus obscuring other forms of work. For example, the Barometer surveys of the Centre for Sociological Research (Centro de Investigaciones Sociológicas - CIS) addressed regularly to people over the age of 18 years old explicitly include the category of “non-remunerated domestic work”, but this is residual to remunerated work. A large proportion of the population does not work with remuneration, or is involved in both types of work, but the Barometer identifies them primarily by their current relationship with remunerated work (and classifies them as “workers”), their past relationship (“the retired”, “the unemployed who have worked before”), or even for their lack of relationship with remunerated work (pensioners who have not previously worked), and thus gives priority to this relationship in preference to social identification and self-identification by means of other forms of work. Between 2009 and 2011, a fall was seen in the number of those identifying themselves as workers, as non-remunerated domestic workers, and as students, while the proportion of the retired, pensioners, and the unemployed rose (Table 1.4).

TABLE 1.4: Typology of occupational status according to the Centre for Sociological Research (CIS) in Spain
(percentage)

	October 2009	January 2011	April 2011
Total	100.0	100.0	100.0
Working	45.4	44.9	42.3
Retired or pensioner (has worked before)	17.5	18.6	19.1
Pensioner (has not worked before)	3.5	3.8	3.3
Unemployed and has worked before	16.7	18.6	20.8
Unemployed and looking for their first job	0.8	0.8	0.9
Student	4.8	3.6	3.7
Non-remunerated domestic work	10.7	9.3	9.3
Other status	0.5	0.2	0.6
Did not answer	0.1	0.1	0.1

N = about 2,000, older than 18 years of age.

Source: CIS, Barometer Surveys, October 2009, January 2011, and April 2011, population older than 18 years of age.

1.4. The heterogeneous geographical distribution of work

The geographical distribution of work is not homogeneous, whether internationally or between the regions within any one country. In Spain, as can be seen in Table 1.5, the regional differences between the average time per week devoted by adults to remunerated work and non-remunerated work are considerable and exceed 30%, regardless of a legal framework which is still a unifying factor. Even supposing that such a thing exists, the “average adult” is different, and has different needs, in each region. There is a difference of 38% in the time devoted to work between the Balearic Islands (with 23.01 hours per week devoted to paid work) and the Principality of Asturias (with 16.69 hours). In respect of non-remunerated work, there is a difference of 30% between Cantabria (with 20.87 hours) and Andalusia (with 27.13 hours). This can be explained partly by the heterogeneous nature of the composition of the population by age groups, but other structural characteristics are also influential. Growing differences deriving from the decentralising process of the autonomous regional communities have been superimposed on the different structures of production. Labour law is beginning to be different in different neighbouring regions, and union activity has to be aware of these peculiarities in the legislation.

In addition to the Time Use Survey 2002-2003, other more recent sources make it possible to estimate the time per year devoted to remunerated work and non-remunerated work in Spain, one of these being the quarterly LFS and a number of surveys by the CIS (Research Study no. 2766. June 2008). The advantage of comparing the LFS with the CIS survey lies in the fact that both obtained their data by means of the memory of the person interviewed, not by the diary system. One disadvantage is that since the data come from different sources, it is not possible to cross the data about the time which paid workers devoted to non-remunerated work and vice-versa. Effective remunerated work is more seasonal than non-remunerated work because of the impact of the vacations: in the third quarter, which falls in the summer, a proportion 16% of those in employment devoted “no time” to work, and this is three times the figure for the second quarter (5%). There are no data with a quar-

TABLE 1.5: Hours per week devoted to different activities, by Regional Autonomous Community, 2003 (INE) (adults over 18 years of age)
(hours and hundredths of an hour)

Regional Autonomous Community	Activity*					
	Remunerated work	Non-remunerated work	Study	Travel	Free time	Volunteer work
Andalusia	18.03	27.13	3.15	7.83	31.84	0.75
Aragón	20.30	26.78	2.07	7.79	34.70	0.60
Asturias (Principality of)	16.69	26.14	2.83	7.07	34.48	0.43
Balearic Islands	23.01	26.49	1.44	10.07	30.84	0.33
Canary Islands	20.85	26.41	2.09	8.77	30.93	0.59
Cantabria	19.75	20.87	2.68	6.57	35.84	0.55
Castilla y León	19.43	25.46	2.11	7.44	35.54	0.71
Castilla-La Mancha	20.54	26.71	2.17	6.73	32.72	0.80
Catalonia	22.71	26.17	2.13	8.53	29.28	0.41
Valencia (Community of)	21.16	25.57	2.48	8.00	32.64	0.65
Extremadura	17.43	27.11	3.21	6.31	35.09	0.72
Galicia	19.56	26.94	2.42	6.99	30.66	0.80
Madrid (Community of)	22.14	24.47	3.05	8.99	32.05	0.58
Murcia (Community of)	20.43	25.00	2.49	7.61	32.29	0.36
Navarre	21.75	24.18	2.08	7.11	33.59	0.84
Basque Country	18.70	25.67	2.78	7.34	36.53	0.51
La Rioja	22.90	25.15	1.82	6.54	33.85	0.59
Ceuta and Melilla	17.86	25.01	1.73	7.12	32.36	1.19
Total	20.39	25.97	2.56	7.95	32.25	0.61

* This refers to the average real time devoted by the entire population over the age of 18 years old.

Source: Prepared by Durán and Rogero using micro-data from the 2002-2003 Time Use Survey in Spain (INE).

terly periodicity for non-remunerated work, but other surveys carried out by the Spanish National Research Council (Consejo Superior de Investigaciones Científicas - CSIC) on earlier dates con-

cluded that the time devoted to non-remunerated work increases during the vacation months (Table 1.6).

Workers in employment (1st Qtr 2011) made up only 47% of those over the age of 16 years old, and among those there is a proportion of 5% who devoted no time whatsoever to paid work during the preceding week. 91% of those over the age of 18 years old take part in non-remunerated work "on any given day", and that allows us to state with a fair degree of accuracy that the number of non-remunerated workers is twice that of remunerated workers.

The time devoted to remunerated work is concentrated in a relatively short period during the life cycle, between 20 and 65 years of age, and it is similarly condensed into a weekly calendar from Monday to Friday. It is most common for men to devote between 1,840 and 2,300 hours each year to remunerated work, with an average of 2,070 hours, while in the case of women it is most common for them to devote between 1,381 and 1,840 hours each year, with an average of 1,610 hours.

To this figure we have to add that 2.1% of paid workers also have a second job, to which they devote an average of 15 hours every week. This second job increases the total annual figure for the time devoted to remunerated work every year by 0.33%. More men have a second job than women, and they devote more time to it, but the differences are less than in the case of the first job; there are proportionately more women who have several jobs of short duration (teaching, paid domestic work, etc.).

With respect to material non-remunerated work (not including care), 16% of men spend no time at all on this, while only 2% of women do none at all. The most frequent case is to spend a small time on it, which is estimated at around 730 hours per year; 72% of men fall into this category, but only 46% of women, and the remainder spend more time. The fact of living as a couple, whether married or simply living together, has significant consequences which are different for men and women: 31% of men who live in a couple spend no time whatsoever on non-remunerated domestic work, while only 0.9% of married women, or those living as a couple devote no time to this. In the only occupational group which has domestic tasks as their principal work (the survey explicitly excludes time devoted to care), which is formed of housewives who identify

TABLE 1.6: Time devoted to remunerated work and non-remunerated work. Spain 2008-2010

A Remunerated work* INE, LFS 2010				B Non-remunerated work** (excluding time devoted to care) "Centro de Investigaciones Sociológicas" 2008							
Hours per year	2 nd Qtr		3 rd Qtr	Hours per year	Total %	Men	Women	Men living in a couple	Women living in wives	House- Retired	
	Total %	Men	Women								Total
None (0) hours	5.11	4.43	5.90	16.35	9.1	16.4	2.0	31.5	0.9	0.7	10.4
1- 414 (207) hours	1.98	1.10	3.10	1.66	59.0	72.3	46.2	60.0	39.8	14.0	51.4
415 - 874 (645) hours	3.55	1.76	5.80	2.97	16.3	6.7	25.5	4.2	25.2	29.3	23.2
875 - 1,380 (1,127) hours	8.10	3.74	13.62	7.10	7.6	2.1	13.0	0.4	12.9	27.4	7.7
1,381 - 1,840 (1,611)	19.54	15.39	24.82	15.21	3.6	0.5	6.5	0.4	8.4	12.4	2.9
1,841 - 2,300 (2,071)	46.36	53.33	37.25	42.79	2.0	0.4	3.6	0.5	4.6	10.4	1.0
> 2,300 (2,300) hours	11.58	15.75	6.50	10.35	1.5	0.2	2.1	0.3	2.8	4.2	1.2
DA	3.62	4.24	2.80	3.50	1.3	1.4	1.1	5.4	2.8	1.6	2.3
Average	1,722	1,849	1,562	1,525	1,173	751	1,522	598	1,644	2,266	1,191
Percentage of those in employment in the population of > 16 years of age	48.00%										

* Using the weekly intervals employed by the LFS (none; 1-9; 10-19; 20-29; 30-39; 40-49; >50) multiplied by 46 weeks. The 3rd Qtr 2010 reflects the summer holidays, and has been kept for the sake of uniformity in the intervals, but cannot be used as a basis for comparison. ** In the case of non-remunerated work the same scale has been used as in the CIS study, referring to "any given day" (none; less than 4 hours; 4-5.59; 6-7.59; 8-10.59; >11), multiplied by 365 days. Those in work who worked during the previous week: (2nd Qtr); Total: 17,531 thousand = 94.88% of those in work; Men: 9,875 = 95.57%; Women: 7,656 = 94.03% of those in work. DA: Did not answer. Source: Prepared by M.A. Durán using data from INE, LFS (Labour Force Survey), 2nd and 3rd Qtr 2010 (population in work over 16 years of age), and Sociology Research Centre (Centro de Investigaciones Sociológicas - CIS), Study no. 2766, June 2008 (those over 18 years of age).

themselves as such, the most frequent case is for them to devote between 1,461 and 2,190 hours per year to it (29%), closely followed by those who spend between 2,190 and 2,920 hours per year (27%), and therefore there is no great difference from the working year of those who are occupied in remunerated work. Although there is no difference between the most frequent working hours, there is a difference in the case of extra-long working hours (more than 2,300 hours per year), which affects more than 27% of housewives, while it affects only 11% of those occupied in remunerated work. Taking the population over the age of 18 years old as a whole, 14.7% spend extra-long working hours per year on non-remunerated work.

Many remunerated workers are also non-remunerated workers, and their overall workload is the sum of the time which they devote to each type of work. Some groups of workers have rates of non-devotion to domestic work which are twice or three times the national average, including farmers, 26%; small businessmen, 23%; directors and professionals, 14.3%. But the rate falls below the average in groups of workers in which there are many women, such as technical experts and middle management (only 4.7% devote no time to non-remunerated domestic work), unskilled workers (6.4%) and office and services workers (8.6%).

1.5. Non-remunerated work

1.5.1. The legal treatment of non-remunerated work

From a legal point of view, it is not easy to discuss non-remunerated work, because up to the present it has been virtually invisible to those making the law (Durán 2000a: 495-433)⁸. In Spain, it does not form a part of collective agreements, there is practically no direct jurisprudence, and neither the labour inspectors nor the labour courts pay any attention to it. Nevertheless, Article 33, point 3, of the Spanish Constitution acknowledges that:

⁸ Small steps are being taken throughout the world towards making non-remunerated work visible in the law, both in the law on political and civil rights and in family legislation, the Civil Code, etc. For Portugal, please see Cunha Rêgo (2010).

Nobody may be deprived of their goods and rights without cause justified by legal utility or social interest, and then by means of the appropriate indemnity in compliance with the provisions of the law.

There is no doubt that non-remunerated work is a resource and an asset to which the same reasoning could be applied as to material goods. Article 40.1 of the Spanish Constitution states that:

The public authorities shall promote conditions which are favourable to social and economic progress and to a more equitable distribution of regional and personal income within a framework of a policy for economic stability. In particular they shall put into effect a policy orientated towards full employment.

The interpretation of the concept of income is the key to defining the appropriate indicators of social progress and economic progress. Are we talking exclusively about monetary and present incomes, or also about non-monetary and/or future incomes? Point 2 lays down the obligation of the public authorities to promote:

A policy to guarantee occupational training and retraining; they shall ensure safety and hygiene at work and they shall guarantee the necessary rest by means of limiting the working day, periodic paid holidays, and promoting appropriate centres.

In order to guarantee occupational training, those who receive it need to have the time to attend, free from other inescapable obligations; and this availability, or lack of it, both in terms of the amount and of the timetable and rhythm, can only be measured by means of time use surveys. In respect of the “necessary rest”, “limiting the working day”, and “paid holidays”, it is evident that this text refers to wage earners, but it can and should also be applied to the rest of the population who are not wage earners.

Article 28, point 2, acknowledges the right of workers to strike “in defence of their interests”. Obviously, this legal text was drafted principally with wage earners in mind, and only secondarily the self-

employed in work. Could other workers, not in work, and other citizens who are not workers express their protest by means of ceasing their non-labour activities? We could imagine, for example, a strike by family members caring for dependents, and the disastrous effects such a step would cause⁹.

The greatest difficulty in the interpretation and measurement of non-remunerated work arises in care work. The Latin origin of the Spanish word for “care” — “cuidado” — can be found in *cogitus*, which means “thought”. Apparently interchangeable terms such as *cuidado*, *care*, *soins*, and *cura* (to take care of) in reality also mean different things and there are no exactly identical terms which would make it possible to translate them from one language into another (Durán 2002a). And that is only to mention the case of four languages which show such a cultural affinity as Spanish, English, French, and Italian. According to the Dictionary of the Spanish Royal Academy, *cuidado* (care) is more a mental action than a physical one, which differentiates it, for example, from “*soins*” in French, which is generally used in the plural and which normally emphasises the physical aspect of the transformation which appears after the application of care. The Dictionary of Spanish Usage (*Diccionario de uso del español*) by María Moliner (Moliner 2007) includes usages referring not only to providing attention and interest in something taking place, but also to preventing a lack of care allowing some adverse circumstance to arise. The absence of consensus as to what the work “cuidado” means, and the shortage of vocabulary in respect of this activity, reveals that the matter has not yet achieved a solid implementation, even if the law on dependence has this as its framework of reference. The limited development of the concept weakens the utility and comparability of the statistics which make reference to care, a problem which is aggravated when it come to a comparison between international sources. Care forms a part of the content of the social contract which binds all social groups: men and

⁹ During the Spanish general strike of 29 September 2010, the retired and pensioners who were affected by the cuts in pensions were encouraged to take part in this type of cessation of activity in some parts of Spain, for example by not taking children to school, or not bringing them back home from school. The proposal generated considerable criticism for transferring the conflict into family relationships.

women, old people and the young. That is why research into care is, to a large extent, an investigation into the mechanisms for the distribution of rights and obligations, as the law (from the Constitution to lower level laws) and social usage understands them.

Although non-remunerated work does not appear as such in the majority of legal texts, the law makers have had it in mind in legislation on the family. Article 1347 of the Spanish Civil Code provides that, in the most frequent economic regime in marriage, that of shared property, the earnings obtained by either of the spouses become common property and is shared in equal parts if the marriage is dissolved. The underlying idea is that within the marriage the work of the woman and that of the man are of equal value, and if this is extended to the assignment of a value per hour of all the work carried out in the household it would be equivalent to assigning it the average value of the work carried out beyond the confines of the household. In marital regimes where property is held separately, the work carried out in the home is considered to represent a contribution to the expenses of the marriage, and grants the right to a pension in compensation set by the courts in the event that the relationship is terminated.

1.5.2. Non-remunerated work in households

Non-remunerated domestic work is the work carried out in the household for oneself or for other members of the household. Unlike forced labour or volunteer work, non-remunerated domestic work throughout the world is of enormous magnitude. Perhaps it would be more accurate to label it as *non-monetarised work*, in order to emphasise that this is a type of work which does not give rise to any immediate monetary transactions, but usage has established the term *non-remunerated work*. From some points of view, domestic work is remunerated, in the sense that the average wage has to include the cost of reproduction (it has to be sufficient for the worker and for his/her family), and it is frequently augmented by allowances for the family situation, or there are tax deductions for the same reason. Nevertheless, the essential element of this work, and what differentiates it from other types of work carried out in the household, is that it is not linked to a direct payment, and in this sense it is correct to identify it as non-remunerated work.

Throughout the world the greater part of non-remunerated domestic work is carried out by women, and this reduces their opportunities to take up remunerated work. It forms a part of a tradition of dividing work by gender which takes on new meaning in contemporary societies in which individual autonomy is closely tied to the opportunity to obtain income from work.

The increase in life expectancy, the decrease in the average number of children per woman, and the loss of the economic importance of family wealth in comparison with income has given a new dimension to the sexual segregation of work, and has deprived it of a part of its historical legitimacy. Nowadays, the search for the recognition of non-remunerated domestic work as “real work” forms a part of the political struggle by women, and is the basis of redistribution programmes which require not only a change in the relationship between men and women, but also between the basic institutions of contemporary economies: the household, the company, and the State.

1.5.3. Volunteer work

Volunteer work is work carried out in favour of a community or a group of persons. It is work which does not seek personal benefit, but which attempts to fulfil a social function. It is not remunerated, and may be carried out informally, outside any institution, or in a formal, organised, manner (as part of an institution). Different types of volunteer work vary depending on the amount of time spent, the duration, the type of relationship, the motivation, the social sector to which it is directed, the place in which it is carried out, and purpose of the activity, etc. Although being non-remunerated is characteristic of volunteer work, it is sometimes difficult to draw the boundary between being remunerated or not, because a volunteer may receive some basic remuneration for subsistence, to cover the costs of travel and performance, etc. In volunteer bodies, popularised under the acronym of NGOs (non-governmental organisations), widely different economic circumstances co-exist, and those who work in and for them also establish very different economic and legal links with the bodies. The sector includes such varied organisations as religious organisations (churches), cooperatives, and philanthropic associations.

Non-profit making bodies or institutions constitute the “third economic sector” as distinguished from companies and the public authorities, but they do not make use only of non-remunerated work¹⁰, and not all volunteer work is limited to this sector. Some volunteer bodies produce goods and services which are sold on the market.

In comparative terms, the amount of work devoted to volunteer work by the population of the world is small, but in some social contexts, in some countries, and in some circumstances, its importance can be very great (for example, in catastrophes or unforeseen situations) (García Delgado 2004; Durán 2002b). Both theoretically and methodologically, volunteer work which is carried on outside organisations is even more difficult to analyse than that carried on within an institutional context, because even researchers on volunteering usually leave it outside their scope of observation¹¹. Volunteer work will not be discussed in this study in more than an occasional manner, to compare with or to complement the analysis of the remunerated work and non-remunerated work performed in households.

1.5.4. Forced work

Forced labour is very different from the other forms of non-remunerated work, and the International Labour Organisation (ILO) distinguishes eight categories: slavery, confined work in remote agricultural areas, bonded labour in repayment of debts, human trafficking, abuse of domestic workers, work imposed in penitentiaries for the purpose of profit, mandatory personal participation in public works, and forced work imposed by the military. Following various treaties to eradicate this, forced work has almost disappeared from the world, although still today, the United Nations is calling people’s attention to the human trafficking of persons sold to work

¹⁰ According to research study no. 2859 of the CIS, January 2011, 0.7% of wage earners work in non-profit making organisations.

¹¹ The CIS Barometer Survey of March 2011, a monograph on volunteer workers, estimated that over the preceding 12 months 11.6% of those over the age of 18 years old had performed some activities in favour of the community; 10.9% had provided care free of charge for persons not part of their family, and 11.7% had carried out educational or cultural support activities, etc. The most frequent commitment by volunteers was once per week, with the average time spent each week being 6.78 hours.

in bonded labour (United Nations 2002). This type of work will not be covered in this study.

1.6. The transitions between remunerated and non-remunerated work

1.6.1. The longitudinal and transversal perspective

Remunerated work and non-remunerated work are the pillars upon which the economic life of a society is based. The collective effort devoted to each is variable, and workers devote different proportions of their capacity for work to one or the other. The degree of devotion to work varies throughout the life cycle, and is very much influenced by social and cultural values. Analyses of a transversal style study the relationship with work at any given moment, while dynamic, or longitudinal, analyses study the way it develops in relation to the time elapsed.

Access to the non-remunerated work sector occurs in quite a natural manner, even if it is with a low degree of devotion of time, when children become young people and begin to take on the responsibility for their own care¹². In subsistence economies, children start to join in with the non-remunerated domestic work very early in order to produce services for themselves and for the rest of the family, such as carrying water and fuel, taking care of the fire or of younger siblings, and in this way they free up the adults from these chores so that they can devote their time to harder, more difficult, or more lucrative tasks. Domestic work, and not just remunerated work, is one of the principal causes of failure to attend school, particularly in the case of girl children. In the more developed countries, too, where there are extensive systems of social services, girls produce more domestic work than boys (Bonke 2010, 14).

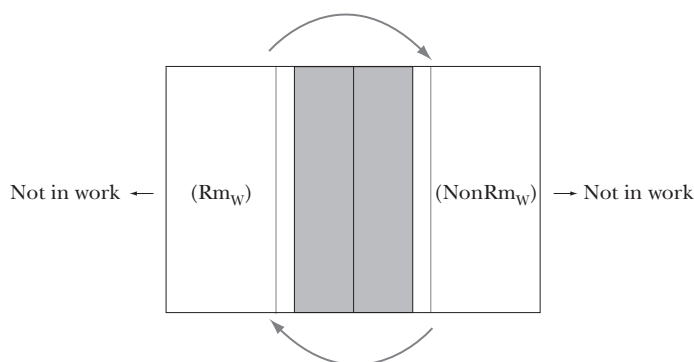
Throughout their school years, schoolchildren take part in a varied amount of domestic work depending on their gender, their

¹² An anecdote which was spread throughout the world was the statement by the wife of the President of the United States, Michelle Obama, saying that her two adolescent daughters continued to make their own beds and tidy their own rooms after they started to live at the White House. The fact that this should become news is an indication of the social and cultural nature of performing this type of non-remunerated work.

social class, and the ideology of their family. Becoming fully involved in this type of work is the principal cause of young women and adolescents not continuing with their studies throughout the world. It is not possible to find out about school age work through surveys of the population in employment, and time use surveys referring to the population of greater than 10 years of age are more useful, together with monographic surveys on youth, on child labour, and on standards of living.

Graph 1.2 shows the interaction between the various different types of relationship with work: the two main columns show the time devoted to remunerated and non-remunerated work: workers who devote time to both remunerated and to non-remunerated work can be found at the intersection of these. Those who were not working at the moment of the analysis can be found outside of the two principal columns. Some workers devote their entire capacity for production to remunerated work (Rm_w), and others to non-remunerated work ($NonRm_w$), and yet others share out their effort between the two types of work. There is also a constant flow of workers who are changing their working relationship, and workers from either of the two types who stop work altogether. In view of the regularity, the solidity, and the great scope of surveys of the population in employment, the best understood transition between sectors of work is what known as “leaving employment”, which these surveys examine exhaustively. The size of the work force and its internal distribution

GRAPH 1.2: The transitions between remunerated and non-remunerated work



between remunerated and non-remunerated work varies widely between societies and between moments in history, in particular with reference to the role played by women.

1.6.2. Leaving employment and being inactive

In Spain, the LFS takes for granted that ceasing non-remunerated work in order to take up remunerated work does not require any investigation as to causes, but on the other hand it breaks down the causes for leaving employment into ten categories:

1. Disappearance of the job, including redundancy plans.
2. Dismissal (which it codes and aggregates with the preceding case, although this may be due to other causes).
3. End of contract (including seasonal work and discontinuous permanent contracts).
4. Sickness or disability of the worker.
5. Taking up education or receiving training.
6. Other family responsibilities, such as caring for children or sick, disabled, or elderly adults.
7. Normal retirement.
8. Early retirement.
9. Other reasons, including the wishes of the worker.

As may be seen in Table 1.7, with reference to Spain, people who do not have or who are not looking for remunerated work are considered to be inactive. This constitutes 40% of the population above the age of 16 years old, and the reasons why they are not spending time in remunerated work are very different from one gender to the other. On third of men, as against only one tenth of women, are not in work because they have retired, which grants them a special position in respect of retirement income. It is 22 times more frequent for women not to be in work than for men (6.7% *vs.* 0.3%), expressly in order to spend time looking after dependents (whether children or sick, disabled, or elderly adults), and similarly it is 15 times more frequent for women to devote themselves to “other family or personal responsibilities” than for men.

The fact that the answer “other reasons” is the second most important for women but is of very little importance for men (15.4%

TABLE 1.7: Inactive population by the reason why the person is not seeking work. Spain 2009 and 2011
(in thousands and percentages)

Total	Men	Women	2009	2011	2009	2011	2009	2011
Total	15,470.70	100.0	15,450.20	100.0	100.0	100.0	100.0	100.0
Being retired	2,990.50	19.3	3,162.80	20.5	32.8	33.5	10.8	11.9
Own sickness or disability	1,577.90	10.2	1,535.20	9.9	13.3	12.5	8.2	8.3
Following a course of education or receiving training	2,266.30	14.6	2,377.20	15.4	18.3	19.4	12.3	12.8
Believes that they will not find work	401.5	2.6	438.8	2.8	2.0	2.1	3.0	3.3
Has been part of a redundancy plan	24.7	0.2	21	0.1	0.3	0.3	0.1	0.1
Taking care of children or sick, disabled, or elderly adults	653.4	4.2	637.2	4.1	0.3	0.4	6.7	6.6
Other family or personal responsibilities	1,803.00	11.7	1,616.30	10.5	1.2	1.2	18.3	16.6
Other reasons	1,750.60	11.3	1,567.10	10.1	4.9	3.9	15.4	14.2
Does not know	26.1	0.2	25	0.2	0.2	0.2	0.1	0.1
Cannot be classified	3,976.70	25.7	4,069.60	26.3	26.5	26.6	25.2	26.1

Source: Prepared by M.A. Durán using data from the LFS 4th Qtr 2009 and 1st Qtr 2011.

vs. 4.9%) makes it obvious that the LFS is not orientated towards measuring non-remunerated work. This is much too high a proportion for it to be included in a residual category.

In principal, it might be supposed that retired people no longer work in remunerated jobs; however, there are many exceptions, in particular among those who work in undeclared part-time jobs or in their own businesses. With respect to non-remunerated work, many retired people put in long working days in this type of work, above all women. According to the Time Use Survey 2002-2003, the average time devoted to non-remunerated domestic work by the entire adult population (over the age of 18 years old), was 2.59 hours per

day on an average day, while the time spent on remunerated work was 2.39 hours.

The distinction between retired people and disabled people brings subtle variations in the reasons for not being in the labour market. Retirement (even when it includes early retirement) makes reference to the “normal” development of the working life cycle, rather as if it meant coming to the expiry date established for productive capacity in the remunerated work sector. From an optimistic point of view, this can be interpreted as the end of a contractual relationship which gives the worker the right to a prize or benefit which matches their contribution in labour throughout the years of their working life. From a less optimistic, but more realistic, point of view, it means the expulsion of the worker from the labour market once they reach the average age which society has agreed that a person’s capacity to produce effectively in the labour market has become weakened. In this sense, retirement is the equivalent of a certification of incapacity, not on an individual basis but assigned by society to the group which has passed the determined age. The improvement seen in standards of living, longevity, and the reduction of the physical effort required in remunerated work, is obliging the retirement age to be postponed beyond 65 years of age.

With respect to not being in work because of illness, the rates for men are 50% higher than for women. This is not to be confused with a worse state of health, and in fact it is just the opposite, but the protection and cover against the risk of illness are different between the two genders. The legal and economic recognition of the status of being sick occurs above all among paid workers, particularly in the case of so-called occupational illnesses, and this status is not recognised in the same way among non-remunerated workers. That is why this category is a derivation from the prior status of being a remunerated worker, in which the proportion of women is lower than is the case for men and less extended through the life cycle.

The permanently disabled are so defined in respect of the job which they carry out or used to carry out in the labour market; many such workers make a significant contribution to the household economy. Among other reasons, because their monetary resources do not permit them to purchase sufficient remunerated work to

take care of their survival needs, and they have to produce such services for themselves.

The category of “Not in employment in order to devote themselves to household tasks” is almost exclusively made up of women who were traditionally called “housewives” and they are a declining group in statistical terms. The time they spend on non-remunerated work is higher than that of any other group, in spite of the fact that the group includes a very high proportion of elderly people. According to the Time Use Survey 2003, the average hours per week spent by them is higher than the time spent by those in employment on remunerated work. As women join the labour market, even as an aspiration, identifying them through the LFS makes their contribution to non-remunerated work invisible, and they are put into a category of those in employment even though they devote a very short day to their employment, and even though in fact they have no occupation. Those who had spent time in the labour market are identified as retired people, regardless of the time they actually devote to domestic work.

Table 1.8 combines the principal cause of being out of work with its secondary causes. The principal secondary cause is non-remunerated domestic work (household tasks), on which one third of those not in employment say they spend their time. This is such a common use of time that those who declare it as their principal tasks barely refer to any other secondary cause. On the other hand, almost half of the retired recognise it as a secondary cause (48%). 13% of the permanently disabled mention household tasks as the secondary cause of their not being in employment. Nor do those in the very small group of those for whom volunteer work is the principal cause of not being in employment mention it; in this case it should probably be interpreted by the reverse conditions, that is to say, that if either voluntarily or by obligation they had devoted their occupation to these household tasks they would have had no opportunity to devote themselves to volunteer work more intensively.

Time devoted to education and training as the cause of not being in employment (Table 1.7) is 50% higher among men (18.3%) than among women (12.3%), which will later have an effect upon the conditions under which men and women join the labour market.

TABLE 1.8: Inactive population by principal and secondary causes
(percentage)

Secondary cause of being not in work	Principal cause of inactivity															
	Total		In retirement or early retirement		Permanent disability		Student		Household tasks		In receipt of a pension other than retirement		Unremunerated social work		Other	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Total	15,450.2	100.0	5,514.5	100.0	1,136.0	100.0	2,524.5	100.0	4,136.2	100.0	1,724.6	100.0	4.7	100.0	409.5	100.0
In retirement or early retirement	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Permanent disability	468.0	3.0	468.0	8.5	-	-	-	-	-	-	-	-	-	-	-	-
Student	58.0	0.4	35.6	0.6	22.4	2.0	-	-	-	-	-	-	-	-	-	-
In receipt of a pension other than retirement	1,215.8	7.9	379.3	6.9	789.9	69.5	46.6	1.8	-	-	-	-	-	-	-	-
Household tasks	5,128.2	33.2	2,661.2	48.3	145.1	12.8	1,002.1	39.7	-	-	1,319.8	76.5	-	-	-	-
Doing social work etc. without remuneration	164.4	1.1	23.7	0.4	1.0	0.1	23.7	0.9	114.4	2.8	1.7	0.1	-	-	-	-
Other	230.4	1.5	16.4	0.3	8.1	0.7	5.9	0.2	188.3	4.6	10.3	0.6	1.4	29.8	-	-
With no secondary cause for being not in work	8,185.2	53.0	1,930.3	35.0	169.5	14.9	1,446.2	57.3	3,833.6	92.7	392.8	22.8	3.3	70.2	409.5	100.0

Source: Prepared by M.A. Durán using data from the LFS, 1st Qtr 2011.

On average, students barely make any contribution to the non-remunerated work of households, although it is greater in the case of women than of men.

With respect to the large group who receive benefits other than retirement benefits, it does not refer to the unemployed (given that they are considered to be active population seeking work) but principally to widows with pensions deriving from the paid work of their husbands, and to a very much lesser extent, other groups who receive orphans' benefits or anti-poverty programme aid. By volume this group is almost as big as that of those in retirement and in early retirement (it is only 17% smaller). It is striking that this group barely mentions non-remunerated domestic work as a secondary cause of their not being in employment. This is probably due more to administrative criteria rather than substantive ones, but since this is a socio-economic class which does not match the classification criteria normally employed in Time Use Surveys, it is difficult to add complementary information as to their share in non-remunerated work¹³.

Although many workers who cease working do not increase the time they spend on non-remunerated domestic work because of it, the transition is different for men and for women. In Spain, the majority of non-working women (43%) are in that situation because they have to devote their time to their other, non-remunerated, work, the household tasks. Even among those who have retired from their former job in the economy that is external to households, 61% continue to work on the domestic tasks and they allege this as the second cause of their not being employed. Not even a majority of women with a permanent disability cease to work on the household tasks. 52% of them take care of these tasks, which set them apart from men with a disability, only 6% of whom work on the household tasks. Changing attitudes towards domestic work and sharing tasks are reflected in the fact that students spend (or say they spend)

¹³ According to the CIS, study no. 2859, January 2011, 13.5% of those in employment believed that it was possible that they might lose their jobs in the following 12 months, and 4.5% considered it to be very likely.

Among the unemployed, 8.7% believed that it was very likely that they would find work in the same period, and 27.0% believed that it was fairly likely, while the remainder considered it to be very unlikely or impossible.

relatively large amounts of time devoted to domestic work, and this applied both to the women (50%) and the men (33%). Nevertheless, the similarity would fall considerably if the number of hours worked were taken into consideration.

Apart from employment and the household, few former workers commit to any new activity involving non-remunerated work, but even though they are a minority, they still carry sufficient weight to become visible in the LFS. In Spain, where the third sector is not very well developed, barely 0.03% of all those not in employment allege that devoting their time to social and charitable work is the principal cause of the fact that they are not in work. 3,800 men and 1,100 women quote this as their principal cause, and it is three times as frequent for men than for women. Nevertheless, in those who quote this as their secondary cause of not being in employment are included, the figures bulk out; there are 211,000 people who devote sufficient effort to indicate this among the secondary causes of their being not in work. This is the case three and one half times more frequently among women than among men (164,000 women, and 47,000 men). Women do not go in for volunteer work as their principal activity for the same reason that they have difficulty in taking on employment, because their time is committed to their households and non-remunerated work.

1.6.3. The good employment pyramid, 2009-2011

In addition to complete transitions between remunerated work, non-remunerated work, and not working, there are also short-term temporary transitions, in which remunerated work is interrupted wholly or partially. The LFS investigates the cause for this, and differentiates it from stable part-time working. Table 1.9 shows the causes for the reduction in the number of hours worked in Spain during the week before the surveys made in the fourth quarter 2009 and the second quarter of 2010. The number of workers who worked fewer hours than normal fell by 40% between these two dates. Seasonal differences make themselves felt in the two surveys (summer and Christmas), and they are independent of the crisis, but they are also due to the crisis: applications for leave and absences for sickness fell not only because of the generalised reduction in the number of those in employment, but because the crisis has

TABLE 1.9: Employed people who worked fewer hours than normal because of reduced activity, by gender. Spain, 2009
(in thousands and percentages)

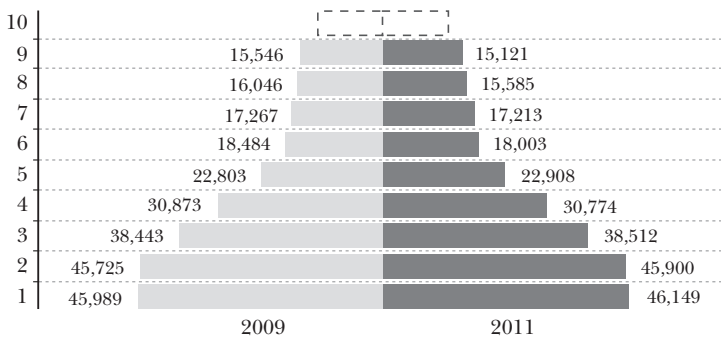
	2009 4 th Qtr				2010 2 nd Qtr			
	Total	%	Men	%	Women	%	Total	%
Total	3,784.6	100.0	2,068.3	100.0	1,716.3	100.0	2,256.5	100.0
Vacation or leave of absence days	787.8	20.8	428.6	20.7	359.2	20.9	438.1	19.4
Leave of absence for the birth of a child	116.6	3.1	12.0	0.6	104.6	6.1	102.9	4.6
Local public holidays	1,761.8	46.6	1,016.9	49.2	744.9	43.4	636.0	28.2
Sickness, accident, or temporary disability	501.9	13.3	244.1	11.8	257.8	15.0	467.8	20.7
Summer timetable, variable, flexible, or similar hours of work	184.1	4.9	101.1	4.9	83.0	4.8	221.3	9.8
End, start, or change of employment	81.1	2.1	38.6	1.9	42.5	2.5	59.3	2.6
Bad weather	48.0	1.3	36.5	1.8	11.6	0.7	31.7	1.4
Partial stoppage for technical or economic reasons	97.2	2.6	69.0	3.3	28.2	1.6	99.2	4.4
Job restructuring	41.1	1.1	33.2	1.6	7.9	0.5	28.1	1.2
Strike or industrial dispute	1.6	0.0	1.6	0.1	—	—	6.4	0.3
Personal reasons or family responsibilities	38.1	1.0	12.2	0.6	25.9	1.5	34.5	1.5
Other reasons	120.3	3.2	72.4	3.5	47.9	2.8	130.0	5.8
Does not know	5.0	0.1	2.2	0.1	2.8	0.0	1.4	0.1

Source: Prepared by M.A. Durán using data from the LFS 4th Qtr 2009 and LFS 2nd Qtr 2010.

caused the risk of loss of employment to rise for workers who ask for special working conditions.

Graph 1.3 reflects the pyramid effect. The first step shows the number of people who live in Spain. The ninth represents those who, according to the LFS, worked full-time in employment during the week before. The length of this latter step is only a third as big as that of the first one. The pyramid would continue to fall if new criteria such as having a work permit, being registered with the Social Security, enjoying the appropriate good health and physical circumstances to carry out the job, or any other of the multiple conditions which make up good employment were to be applied¹⁴.

GRAPH 1.3: The employment pyramid in Spain
(in thousands)



1: People living in Spain, according to data from INE in “The current population of Spain” updated to 1 January 2010 and 1 April 2011. **2:** Estimate of people living in housing, according to data from the LFS, 4th Qtr 2009 and 1st Qtr 2011. **3:** Estimate of people older than 16 years of age according to data from the LFS, 4th Qtr 2009 and 1st Qtr 2011. **4:** Estimate of people between 16 - 65 years of age according to data from the LFS, 4th Qtr 2009 and 1st Qtr 2011. **5:** Estimate of people between 16 - 65 years of age who have or are seeking employment, according to data from the LFS, 4th Qtr 2009 and 1st Qtr 2011. **6:** Estimate of people between 16 - 65 years of age in work, according to data from the LFS, 4th Qtr 2009 and 1st Qtr 2011. **7:** Estimate of people in employment who worked during the previous week, according to data from the LFS, after subtracting the estimated number of people over 65 years of age (6.8% of those in work) and 1st Qtr 2011. **8:** Estimate of people in full-time employment, according to data from the LFS, 4th Qtr 2009 and 1st Qtr 2011. **9:** People in full time employment who have been paid for it, who have the legal right to be paid for it, are covered by the Social Security, etc. *Source:* Estimates prepared by M.A. Durán, using data from the LFS, 4th Qtr 2009 and 1st Qtr 2011 2011.

¹⁴ Workers without work permits were above all illegal immigrants and the retired. Some estimates by the Spanish conservative Popular Party put the number of illegal immigrants at 1,470,000 in 2010, and it was estimated that they had a high rate of employment. Other estimates by the Government reduced these figures. The number of retired

For the step which is equivalent to quality employment, which can also be called a *decent job*, there are no reliable estimates but there is no doubt that its size is very much smaller than the preceding step.

1.7. Invisible work, unmeasured and concealed

1.7.1. The growth of casual labour in the world

In an extensive report in the year 2002, the ILO acknowledged that, contrary to what had been expected, the informal economy was growing rapidly even in the industrialised countries, and it could not therefore be considered to be a temporary or marginal phenomenon. Informal work is a response to the incapacity of the market to create formal employment and to satisfy the demand for jobs. It is not denominated a “sector” because it lacks structure, and the term “informal economy” is used to refer to the large group of workers and entrepreneurs in the country and in the city who work in this way.

Paradoxically, information and communications technology (ICT) have made their contribution to making labour relations more flexible and making production informal, and this makes for new ways of internationally decentralising production and distributing goods. It is commonly accepted that the greater proportion of new jobs created in the world over the last decade have been in the informal economy; for example, in Africa it has created more than 90% of newly created jobs, including more than 60% of new urban employment and 80% of non-agricultural employment (ILO 2002, 7).

Informal work suffers from more shortfalls in safety and in other types of attributions than formal work. The informal economy grows in times of crisis as a shock absorber against the lack of jobs, and in-

people who were working without the right to do so was high, for the most part in discontinuous part-time work, but there are no solid estimates of the volume. As a minimum assumption, we estimate that among the workers who in full-time employment the previous week there were 500,000 who were not legally permitted to do so. In 2011 (1 March), the Department of State for Immigration estimated that some 270,000 immigrants had returned to their countries of origin since the crisis began. The figure for legal residents had fallen by 1.4%.

volves “a marginalisation of the activity and a labour force characterised by low productivity and low standards of living” (ILO 2002, 29). In the extensive report cited, the ILO gives a map of informal work, and highlights how heavily it is implanted in Africa, Latin America (ILO 2002, 25)¹⁵ and in some Asian countries, among which it documents the case of China, Mongolia, Japan, and Indonesia. In Europe and North America, casual work is a frequent phenomenon among the unemployed and in the second employment.

Since casual labour is a resource for families when there are no better alternatives, child labour also feeds on the casual economy. The ILO estimates that there are 211 million child labourers, of which 102 are girls. Girls are more vulnerable because they start to work younger, they receive less money for the same work, and they work longer hours. If the non-remunerated work in households were to be included, the number of girl workers, would according to this report, be greater than that of the boys. In some cases they take on domestic commitments before the age of five years old. The incidence of child labour is twice as high in rural areas as in urban areas (ILO 2002, 36). In Latin America it is a phenomenon which affects the entire region, where 85 out of every 100 arise out of the initiative of the unemployed people themselves. After the recovery in the decade from 2000 to 2010, these figures fell, but the phenomenon continues to be very widespread. The casual economy gives work above all to women, as a family strategy in order to escape poverty. These women, of all ages, do not normally receive a differentiated remuneration for their contribution. It has been documented that in some countries, such as Mexico, the wage gap between men and women in the formal sector is 11%, and in the casual sector it is 37% (Pacheco 2004; Parra 2004).

Globalisation has increased worldwide integration, with positive and negative consequences for the labour market. By increasing competition, tensions are generated for local companies which may constitute a worsening in working conditions; but simultaneously it expands the diffusion of technology, direct investment,

¹⁵ The change in the figure for the minimum size of companies to include them in the informal category gave rise to major changes in the estimates of the number of casual workers.

and international migrant labour, which improves working conditions. The impact of the world financial crisis hit the workers in the casual sector, and in particular domestic workers, travelling salesmen, and recyclers (WIEGO 2010). But it is not global warming itself which generates problems for workers or the economies of countries in transition, but the use which some companies and some national governments make of it when they take part in what are known as “flexible global specialisation chains”. In the face of the deficit in social protection which exists in the casual economy, the ILO proposes to focus on the causes of the lack of good jobs instead of focussing on its consequences. For this purpose, they propose legal measures to motivate good practice, such as micro-insurance and micro-credits, welfare support, cooperatives, the strengthening in the representation of casual workers in social dialogue, the prohibition of harmful practices, and, above all, measures to train workers in order to facilitate access to productive employment.

1.7.2. The weak flank of the system of national accounts

The availability of a good system of national accounts (SNA)¹⁶ is an indispensable condition for adopting effective political measures. In order to achieve this it is essential to be clear about what is to be observed, how it is measured, and what type of relationship it is assumed to exist between the different topics which are to be studied. In countries like Spain, which began to see unemployment rates in excess of 20% of the active population in the year 2010, and in which the social resources applied to alleviate this situation consume an unsustainable proportion of the national budget, understanding the invisible casual economy should be a priority in research on remunerated work.

Frequently the social agents and public opinion show their bewilderment at the results shown by the national accounts, as much by their level as by the growth or shrinkage they show, as by the relationships between the active parties which they present. In reality, the SNA are a convention, as is demonstrated by the immense, and

¹⁶ The *System of National Accounts*: SNA.

growing, book of instructions which accompany them in order to resolve all the queries which they may arouse, and to set out the agreements which have been adopted in order to resolve them¹⁷. The most appropriate way to interpret this is not to consider it a definitive agreement or point of arrival, but a process under development in which non-remunerated work has a fluid status which can change (Hirway 2005, 3). Or, rather, to induce change in the SNA themselves in order to transform them from within or from the outside.

The use of one or another criterion in order to measure gross domestic product (GDP) is of considerable political importance, because the success or failure of an economic programme cannot be evaluated if the figures upon which it is based lack solidity or sense. The problem is particularly serious in transitional states. As Feige and Urban (2008) point out, the lack of convergence between the estimates of the NIPA (national income and product accounts) which is intended to achieve completeness in the GDP, including assignments of the NOE (non-observed economy), and the results obtained by other procedures, are “disturbing and cause growing doubts” about the reliability of the estimates of GDP and about the macroeconomic models used to estimate the submerged economy.

The highly influential manual of the OECD on the measurement of the non-observed economy (OECD 2002, 192) summarises the debate about measurement when it states:

1. In the majority of countries, national accountants enjoy a great variety of sources which permits them to make more accurate estimates than any other macroeconomic model can achieve.
2. It is the responsibility of the national accountants to inform users of:
 - 2.a The extent of the non observed economy, that is to say, what proportion of economic activity escapes direct measurement.

¹⁷ This was “That big blue book with its two thousand pages” to which Gómez Luna was referring in his presentation on the National Accounts in the International Seminar on Time Use Surveys, Río de Janeiro, Brazil, 9-10 September 2010.

- 2.b The extent of the unmeasured economy, that is to say, what proportion of the non observed economy fails to be included in GDP after the adjustments proposed in the manual itself have been carried out.
3. The lack of transparency in the description of the procedures employed in compiling the national accounts is the principal reason why those who are not in the system resort to other types of research, such as “micro-modules”, and produce estimates which undermine the credibility of the national accounts.

For the year 2004, Schneider and Klinglmaier (2004-03) estimate that in the developing countries 41% of the economy was not included in the GDP. In the transitional countries emerging from the former socialist regimes, it was 38%. And for the OECD countries, 18%. In the case of Africa, the average of the twenty-four countries studied for this report was 41%, although the differences between the countries with the highest proportion of submerged economy (Zimbabwe, 59%, Tanzania, 58%, Nigeria, 58%) and the lowest (South Africa, 28%) were considerable. With respect to Asia, in the 26 countries studied the average proportion of the submerged economy in the official GDP was 26%. Japan (11%) and Singapore (13%) had low levels, while in Thailand (53%), Sri Lanka (45%), or the Philippines (43%) it was very high. The average for the 17 countries studied in Latin America was 41%, with maximum levels in Bolivia (67%), Panama (64%), and Peru (60%), and with minimum levels in Chile (20%) and Argentina (25%).

In the 23 transitional countries studied, the average was 38%, with maxima in Georgia (67%), Azerbaijan (61%), the Ukraine (52%), and the minima in Slovakia (19%), the Czech Republic (19%), and Hungary (25%).

The lowest proportion of submerged economy is to be found in the OECD countries, where sequences of studies have existed since the 80's. In the opinion of the authors, the submerged economy grew from 13.2% to 16.4% over the period from 1989 to 2002.

The estimation methods employed by these authors, particularly in countries with the least developed statistics, includes an analysis of the demand for circulating money and the consumption of elec-

tricity, two indicators which other analysts consider to be excessively indirect. The principal cause of growth in the submerged economy is the desire to evade the tax load and Social Security contributions, together with the restrictions imposed on the exercise of any activity by the regulations of the public authorities.

Leaving aside methodological discussions about the effectiveness of some indicators, what is evident is that the national accounts do not measure the whole economy, but only a part of it. And the efforts of the statisticians and researchers who work on producing the national accounts are not directed principally towards measuring the economy, but to observing and measuring better and better that part of the economy which they have agreed to make the object of their attention. That is why the dialogue between researchers interested in other dimensions of the economy and those interested in the sector analysed by the national accounts is frequently a dialogue of the deaf, in which some search for, or complain about, what is not there, while others rush to demonstrate the excellent quality of what is there.

The great number of services produced by members of households for themselves is not considered to be non-observed production by the OECD manual, and the restriction of the range of the topics under analysis is expressly accepted. This is done in order to abide by the delimitation of the field included in the *System of National Accounts 1993*, generally known as the 1993 SNA.

There is no doubt that progress in the quality of the measurements of the 1993 SNA throughout the entire world opens up a stimulating path which can be useful in any other field of research in economics, but it only deepens the difference in the degree of understanding between what is happening on each side of the conceptual barrier which the very definition of production given in the SNA sets up. Nobody is unaware — and we have to acknowledge with gratitude the clarity and cleanliness with which this OECD publication sets out the territory — that in households a huge effort is devoted to the production of services for self-consumption; nevertheless, there is no body of systematic knowledge which is periodically updated on this which could be compared with the effort devoted to the study of production for the market.

Since this is a weak flank of the economy as conventionally delimited by the SNA, the non observed economy is of particular

conceptual and methodological interest for those who are researching the other economy, the part which wholly escapes the SNA.

The non-observed economy creates a degree of discomfort not only for political leaders and for technicians, but also for simple users of the economic information. It reminds political leaders of the existence of obscure corners, of illegality or areas unprotected by the society which they govern, and sows doubts about the effectiveness of their management. It means discomfort for technicians because it throws doubt upon their capacity to fulfil the task which has been assigned to them. Or, at the very least, it makes clear the limitations to the field in which they are experts. The unease is more serious because these are estimates of very high visibility to society, and for which the technical people and governments have to take responsibility and accept external evaluation, frequently related to international commitments, image abroad, sanctions, and rewards.

With respect to users and public opinion, the non-observed economy provokes a multitude of reactions, depending on the activity being referred to. The most frequent reaction is annoyance in the face of the suspicion that the tax load preys on those who belong to the transparent economy, in particular on wage earners, and leaves other sectors immune from contributing to taxation and free to obtain greater economic benefit. Nor can we ignore the effect of incredulity transferred to the estimates as whole, or the uncertainty which arises when serious illegal activity is revealed. Nor, at the other end of the scale, the complicity or solidarity shown by part of the population towards those in the non observed economy in view of their skill at evading bureaucratic obligations which have never been wholly accepted, in addition to the tax obligations.

Some of the names with which the non-observed economy is identified are *hidden economy*, *shadow economy*, *parallel economy*, *cash economy*, *informal economy*, and *black market*. Since there is no vigorous infrastructure, such as exists in any reasonably developed country for the preparation of the National Accounts, the few studies published on the non observed economy are partial, discontinuous, poorly comparative and repeated in subsequent research, and cannot be standardised on an international level. They are often based upon barely reliable sources, or establish indirect connections (tak-

ing, for example as an indicator, the demand for money, or the money in circulation) with indicators which other experts do not consider to be appropriate. The reason for designing the OECD guide mentioned above was in order to improve the level of completeness in the observation and measurement of the economy, and it has had great impact since it was published in 2002.

In the National Accounts, the value of the inputs has to be equal to the value of the outputs, by definition, but the same is not true in the economy which is outside the market. For example, the input of preparing a salad at home may be much higher than the value of an equivalent salad in the market, particularly if the person who does this in the household is a highly qualified worker.

1.7.3. Methodological difficulties and political dissent in the estimation of the non-observed economy. The proposals of the United Nations Economic Commission for Europe

The United Nations Economic Commission for Europe (UNECE) has been trying for more than a decade to improve the degree of completeness of the national accounts, not only in Europe but also in other countries.

In the first round of the Pilot Project on Completeness (PPC) which took place in 1998/1999, Eurostat developed a framework of tables which related the areas of the non observed economy with the principal statistical problems found in the National Accounts of various countries. In doing so, eight types on non completeness were identified, numbered in sequence from T_1 to T_8 , and we have grouped them together here into five groups on the basis of internal similarity:

1. *Under-coverage arising from statistical causes:* No answer (T_1); Records not updated (T_2); Economic units not recorded or not interviewed (T_3).
2. *Submerged economy:* Under-declaration of production or income and over-declaration of intermediate consumption in order to evade taxation or other social obligations and the Social Security (T_4); economic entities intentionally not recorded (T_5).

3. *Casual Sector*: Economic entities not recorded when there is no obligation to do so, such as production in agriculture, construction, or services for self-consumption in the household (T_6).
4. *Illegal production* (T_7).
5. *Other types of under-coverage*, principally payments in kind and tips (T_8).

43 member countries and some countries which did not belong to the organisation collaborated in this first round of consultation and methodological exchange of the UNECE. Improvements in completeness were achieved in all or some of the points presented in Table 1.10, in which an estimate of the volume of non observed activities in comparison with GDP is also shown.

During the period from 2005-2006, the statistics division of the UNECE organised a second round in order to create an inventory of the statistical practices employed in order to mitigate the difficulties arising in the direct observation of GDP and to evaluate, insofar as it is possible, the change in GDP which would arise in the event that the non observed activities were to be included. New Zealand and Japan took part in the Project but they did not estimate the NOE¹⁸. In this second round, which was more complex than the first, the areas in which it was difficult to achieve completeness were regrouped and numbered from N_1 to N_7 .

In order to estimate the NOE, in the absence of other bases, countries employ such widely varied resources as censuses, police reports, foreign trade statistics, directories and companies, Social Security data, tax data, and statistics. Some of the statistics most employed in some countries are the Labour Force Survey and the Family Budgets Survey. The information is processed from different ap-

¹⁸ The participating countries were: Members of the EU-15 (Austria, Belgium, Spain, Finland, Germany, Ireland, Italy, the Netherlands, Sweden, and the United Kingdom); new member countries of the EU (Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, and Rumania); OECD countries not members of the EU-15 (Australia, Canada, Mexico, Norway, and the United States); EU candidate countries (in 2005) (Croatia, Macedonia, and Turkey); countries of the CIS (the Community of Independent States) (Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldavia, the Russian Federation, Tajikistan, Turkmenistan, the Ukraine, and Uzbekistan), and other countries (Albania, Brazil, Mongolia, Montenegro, and Serbia).

TABLE 1.10: The impact of the NOE (non-observed economy) on GDP*
(percentage)

Country	Year	Size	N1	N2	N3	N4	N5	N6	N7
EU New members									
Bulgaria	2001	10.2	.	.	.	.	.	.	.
Czech Republic	2000	4.6 (E), 6.6 (I), 9.3 (O)	.	.	.	.	.	.	.
Estonia	2002	9.6	.	.				.	.
Hungary	2000	11.9	.	.	.			.	.
Latvia	2000	13.6 (O), 8.28 (E)	.	.				.	.
Lithuania	2002	18.9	.	.				.	.
Poland	2002	15.7 (O), 7.8 (E)	.	.	.			.	.
Romania	2002	17.7	.		.			.	
OECD – EU Members									
Austria	2001	7.9	.		.	.	.	.	.
Belgium	2002	3.0-4.0	.		.			.	.
Finland		No return	.		.			.	
Germany		No return	–	–	–	–	–	–	–
Ireland	1998	4.0			.	.		.	.
Italy	2003	14.8(L), 16.7 (U)	.		.	.	.	.
Netherlands	1995	1.0						.	.
Spain	2000	11.2	.			.		.	.
Switzerland	2000	1.3		.				.	.
United Kingdom		No return	.		.		.	.	.
OECD – Non-EU Members									
Australia	2000-01	1.3			.			.	.
Canada		No return	.	.	.			.	.
Mexico	2003	12.1	–	.	.	–	–	–	–
Norway	1995	2.4(O), 1.0 (E)			.	.	.	.	.
United States	1997	0.8						.	
EU candidate countries									
Croatia	2002	10.1	.	.	.	.	.	.	.
Macedonia	2003	16.3	.		.			.	
Turkey	2004	1.66	.		.			.	

TABLE 1.10 (contd.): The impact of the NOE (non-observed economy) on GDP*
(percentage)

Country	Year	Size	N1	N2	N3	N4	N5	N6	N7
CIS									
Armenia	2003	28.9	.		.			.	
Azerbaijan	2003	20.7	.		.	.	.		.
Belarus	2003	10.7	.		.				
Georgia	2004	28.3	.		.			.	
Kazakhstan	2003	21.6	.	.	.			.
Kyrgyzstan	2003	17.0	.		.			.	
Moldavia	2001	31.6	.		.			.	
Russian Federation	2003	24.3	.		.	.	.	.	.
Tajikistan	No return	25.0	.		.	.	.
Turkmenistan	2005	18.1	.	.	.			.	.
Ukraine	2003	17.2	.	.	.	.	.	.	.
Uzbekistan	No return	29.0-30.0	.		.		.		
Other									
Albania	2003	30,8	.					.	
Brazil	2003	12,79	—	—	—	—	—	—	—
Mongolia	No return	13,0 or 30,0	.		.				
Montenegro	2002	8,8	.		.		.	.
Serbia	2003	14,56	.	.		.	.	.	.

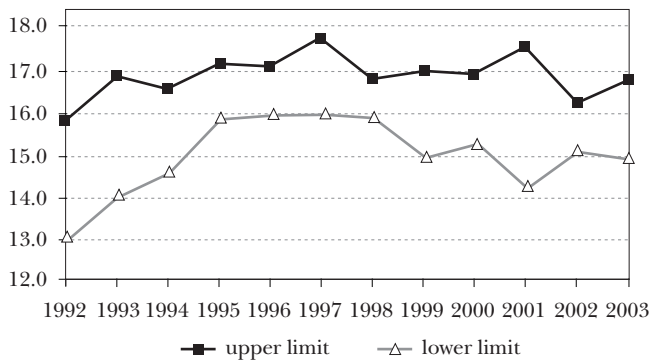
* Marks with a dot indicate that the report has data on this point.

Notes: O: Production focus; E: Expenditure focus; I: Income focus; L: Lower limit estimate; U: Upper limit estimate; "—": It is not possible to determine what types of NOE are covered on the basis of the return to the survey by that country. CIS Community of Independent States.

Source: United Nations Economic Commission for Europe (UNECE), *Non-observed Economy in National Accounts. Survey of Country Practices*, United Nations, New York and Geneva 2008.

proximations to GDP, in particular from the three classic approximations via production, expenditure, and income (Graph 1.4).

In the UNECE project on accounting practices, non-remunerated work in households is not included because it does not form a part of the type of completeness which is being looked for. Volunteer work does not form a part of their objectives, either.

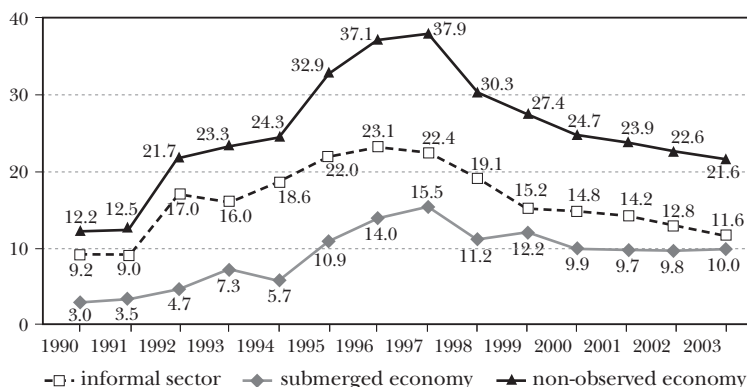
GRAPH 1.4: Adjustments from the submerged economy in GDP, Italy

Source: United Nations Economic Commission for Europe (UNECE), *Non-observed Economy in National Accounts. Survey of Country Practices*, United Nations, New York and Geneva 2008.

The points upon which the UNECE project focussed were deliberately unrecorded submerged economy (N_1), deliberately unrecorded illegal production (N_2), unrecorded production which it is not obligatory to record (for example production in households for self-consumption, self-repairs, micro-production, etc.) (N_3), unidentified legal personal production (incorrect data, errors) (N_4), unidentified production of recorded business (errors, unavailable data, or not updated data) (N_5), producers who deliberately make erroneous returns about their activity (reduction of sales, increase in intermediate consumption, double accounting, etc.) (N_6), and other statistical deficiencies (N_7)

Although many countries follow the OECD Instruction Manual, others do not, and therefore the comparison of the observed economies and the non-observed economies presents considerable difficulty. In general, it is accepted that the proportion of the NOE in comparison with the observed economy is reducing, and completeness is being approached, but there are major exceptions to this rule. Furthermore, this trend was established during a period of economic expansion and there is no evidence that it has been maintained since the crisis of 2007. Some countries have historical series and others do not. As can be seen in Graphs 1.4 and 1.5, while the NOE shrank by almost half between 1997 and 2007 in Kazakhstan, estimates for Italy indicate that the NOE was stable over the same period.

GRAPH 1.5: Share of the non-observed economy in the GDP of the Republic of Kazakhstan



Source: United Nations Economic Commission for Europe (UNECE), *Non-observed Economy in National Accounts. Survey of Country Practices*, United Nations, New York and Geneva 2008.

1.7.4. Some national estimates of the NOE

The UNECE has classified the accounting systems of countries in terms of the manner in which they treat the non observed economy (UNECE 2008a, 9-10).

1. *Countries which follow the Eurostat Tabular Framework rigorously.* The new members of the European Union, the candidate countries, and some countries within the CIS (the Community of Independent States), such as Kyrgyzstan, Turkmenistan, and the Ukraine fall into this group.
2. *Countries which attempt to ensure the completeness of their National Accounts in a systematic manner, but which do not regularly and specifically measure their NOE.* In this group we may find Germany, the Netherlands, the United Kingdom, Ireland, Finland, Norway, the United States, Canada, and Australia.
3. *Countries with their own approach to the question.* It is possible to distinguish among these:
 - 3.a Countries which use their own methods and interpretative frameworks. Italy has been a pioneer in the study of the NOE, and their method, known as “the Italian Method” is used in other countries.

- 3.b Countries which have measured some specific sectors of activity by means of *ad hoc* studies, without intending to include this in the general framework of the National Accounts. These include Armenia, Georgia, Mexico, Mongolia, Tajikistan, and Turkey.
- 3.c Countries which have measured work in the informal sector, generally by means of the labour input method. Albania, Brazil, and Moldavia are among these countries.

The data refer to the years in which the most detailed study was made in each country. The variety of dates makes it difficult to make comparisons between countries, because the situation could have changed since each study was carried out, but this provides the best available framework for a comparative analysis. On the other hand, the participating countries are among those which carry out the greatest statistical monitoring of their economy and of their social structure (UNECE 2008a, 9). Although the UNECE report does not explicitly say so, it could be concluded that the impact of the NOE on estimated GDP is much greater in the majority of countries which did not participate in the UNECE project than in those which did take part, and that fact demands the greatest caution when making use of their own estimates of their GDP.

The detailed analysis of each national report highlights even more the difficulties in making international comparisons. If, when all is said and done, it has only been possible to achieve the degree of harmonisation which these reports make evident in a matter which forms a part of an internationally agreed field and enjoys the support of the most important institutions, what can be hoped for in other fields in which there is still no similar consensus or sufficient institutional backing, whether local or global?

The report on Spain has gained interest because of the disagreements subsequent to the report (UNECE 2009) between the estimates handled by two ministerial departments, Labour and the Economy. This is a sensitive matter in public opinion because of its connections with tax fraud and public aid. In this context it is necessary to evaluate the importance of each figure and each commentary recorded and disclosed by the press. During the days that this remained a white hot topic in the communications media, nobody

remembered the report presented to the United Nations to which we were referring, published two years before, and with reference to a period of economic expansion. In this official report, no estimates were presented in respect of illegal production not implicit in the “Other Activities” item. The adjustment arising from statistical underestimates was calculated at 2.95% of GDP, that from economic underestimates at 7.55%, and that from other sources at 0.69%, which gives a total of 11.19% of GDP. The report did not use the classification of the second round of the UNECE project (N_1 to N_7), but that of the first round (T_1 to T_8), and that makes international comparison somewhat difficult. It was focussed on methodological questions, describing the manner in which multiple sources were used in order to attain completeness, and to update the estimates in the National Accounts. It indicated that when making estimates of GDP the three classic perspectives of production, income, and expenditure were used in conjunction.

The technical experts who drew up the report on Spain for the UNECE considered that under-coverage arising from statistical inefficiency (points T_1 to T_3) was small, because the databases were good and were updated. With respect to the informal economy, they considered that “this type of economy is no longer significant in Spain” and that illegal production was already partially included in the National Accounts. For example, prostitution and betting were included by way of night clubs or massage parlours (UNECE 2008, 285). In the case of the remainder of illegal activities which “are not implicitly included in the National Accounts”, no adjustments were made to the estimates. The report acknowledges that there may exist some under-estimation in the submerged economy, and indicates that the other types of production (tips, payment in kind) were difficult to disaggregate, particularly in the sectors of household, construction, and education employees, although specific surveys and studies had been designed.

In October 2008, the Technical Experts Union of the Ministry of the Economy (GESTHA) published some estimates according to which the submerged economy in Spain stood at 23% of GDP, consisting particularly of tax and Social Security fraud, and located principally in the property sector and the professions. One year later, the communications media made reference to a *Report on Unemploy-*

ment presented in Barcelona by the Catalan small and medium enterprises employers' association (PIMEC), in which it was stated that "the submerged economy in Spain represents approximately 23% of GDP, ten points higher than the average of the top fifteen countries in the European Union". The legalisation of the submerged economy up to the average level of the principal European countries "would create 2.5 million regulated jobs" (*El País*, 14/10/09). A few months later, in the presentation of the annual report on the activities of the Labour Inspectorate, the Minister responsible for this Department publicly stated that the submerged economy could represent between 16 and 20% of GDP, a growing percentage in times of crisis (*El País*, 4/01/10). The Minister was basing their comments on various different international sources, but also offered the extraordinary piece of information that 40% of the activities of the Labour Inspectors of their ministerial department was directed towards monitoring the submerged economy. His statement was immediately contradicted by the Ministry for the Economy, which alleged that no reliable studies existed, because "what is submerged cannot be quantified". To add noise to the controversy, the opposition accepted the data on the submerged economy as correct, and laid the blame for the growth on the government itself.

What has still not yet been sufficiently highlighted is the high degree of internationalisation of the population of potentially active workers in Spain. The activities of the Labour inspectors that were mentioned can do little in respect of the activities of workers outside Spain during periods when they are covered by the Spanish social protection systems (unemployment insurance, etc.) but do not have the obligation to remain physically on Spanish soil. And the reverse is also true, in respect of workers covered by the social protection systems of other countries. Public opinion considers that there exists a high degree of fraud in the economic relationship between the citizens and the Public Administration¹⁹.

¹⁹ Gabriel Pérez Alcalá. 15/02/2010. Interview by F. Expósito. He considers that the economic crisis has increased and worsened the incidence of the submerged economy. In the interview with P. Lucio, Employment minister of the Regional Government of Extremadura, she estimated on the basis of inspections that the submerged economy had increased by 30% in the year 2009 in comparison with 2008 (20/10/2009) [Consulted at: www.soiu.es].

The reports of the UNECE are very different from one another, in both extent and procedure, and emphasise the great difficulty met by innovation and refinement of the measurements in national economies. For example, the report presented by the United States has a markedly historical nature, and sets out the reflection of the changes in the manner of defining and estimating the submerged economy since 1936 on the NIPA (National Income and Production Accounts). The BEA (Bureau of Economic Analysis) in the United States estimates that there is a gap of only 0.8% of GDP, but 5% of GDI (*gross domestic income*). It was expected that a further report would be published in the near future.

In the United Kingdom a considerable effort has been put into estimating the added value of illegal activity. In the majority, these activities generate income for the household sector, and it is therefore not very likely that they would generate discrepancies in obtaining GDP by means of the classic perspectives of income and expenditure (UNECE 2008, 323). Some transactions are illegal but not concealed from the National Accounts (for example, alcohol or tobacco sold to underage persons). In respect of other illegal activities, attempts have still not been made to carry out specific adjustments to include them in the National Accounts (for example, the sale of heroin), in view of the difficulty in finding accurate and reliable data.

Estimates of the submerged economy in Australia run from 1.3% to 15% of GDP. This is a very large discrepancy for a developed country, which is evidence of conceptual disagreements between the experts. The Australian Bureau of Statistics (ABS) does not support the estimates of 15% made on the basis of monetary models of unexplained money in circulation to which we have referred in previous paragraphs, and gives them little credibility. They maintain that the estimates showing little impact are correct, because a major part of undeclared activities have already been measured by other procedures and incorporated into the estimate of GDP. This impact is heavily concentrated in certain segments of the economy, for example in gross mixed income (GMI), in which the ABS themselves estimate that it could reach as much as 37.4%.

What is interesting about the report on Kyrgyzstan, which shows estimates for the period from 1995 to 2003, lies in the fact that it

contradicts the idea that in all of the economies analysed by the UNECE the casual, or hidden sector is tending to shrink. While the submerged economy was estimated at 8.4% of GDP in 1995, the estimate doubled to 17.0% for the year 2003. Whereas in some activities, such as mining, the non observed economy is irrelevant, in others it reaches 83% of gross added value (GAV). This is the case in selling and repairing cars and domestic items, where the NOE is equivalent to 12% of the entire GDP of the country. This report offers the attractive methodology of disaggregating the hidden economy and the casual economy for a long series, from 1990 to 2003. The non observed economy reached its peak in 1997, at 37.9% of GDP. Since then it has been estimated that the casual sector has progressively shrunk, while the hidden economy has remained almost stable. For the year 2003, the entire non observed economy was estimated at 21.6% of GDP.

The most important aspect of the report on Mexico, which estimates that the NOE is 12.1% of the country's GDP, is the brief introductory methodological note in which the scope of the study is delimited. The estimate only refers to the informal economy, and the report itself emphasises the fact that it "does not include the submerged activity arising from the illegal activity of companies, nor such illegal activities as drug trafficking, software copying, resale, unauthorised medicines, street car cleaners, the sale of illegal substances, domestic service and street pedlars, food made in the home and sold, and other hidden activities which are carried on as secondary activities (hotel car parking assistants, etc.)"²⁰. There is no doubt that if this long series of activities which they list were to be included, the proportion of the NOE in the GDP of Mexico would be very much higher than the figure the report recognises.

The report on the Russian Federation was carried out by the Russian Federal State Statistics Service (RosStat). The macroeconomic indicators include submerged and casual production, which is estimated at between 22% and 25% of GDP. On the other hand they do not include illegal economic activities, although there are a number of studies in progress to be able to do so. Adjustments in the calcula-

²⁰ For a more extensive treatment of the informal economy in Mexico, see the Annex "A decent job and the informal economy" (ILO 2002).

tion of the NOE are carried out by means of the three modes of measurement of GDP: the perspectives of production, income, and expenditure, including capital formation, exports, and imports. It is estimated that in sectors such as sales, NOE amounts to 42% of added value, and in agriculture, 33.3%. This report uses the Labour Force Survey intensively for this purpose. According to the official source of statistics, the number of jobs (principal or secondary) in the informal economy is increasing. In 2004 it was estimated that 18% of jobs lay in the informal economy. 81% of these jobs were the main job, and only 19% were secondary. 15% of principal jobs were informal, as were 87% of additional or second jobs. In urban areas, informal employment occupied 13% of those in employment, and in rural areas it was 31%.

In spite of the existence of numerous sources and continuous progress in estimation, the experts at RosStat recognise that it continues to be difficult to calibrate the volume of the informal economy, as a result on the one hand of the fact that the system of statistics refers in some sources to establishments, and in other to companies, and on the other hand to the fact that in the Russian Federation the informal economy is very sizable in agriculture, commerce, restaurants and hotels, the property sector, repairs and shops. New reports are expected for the year 2011, based upon monographic surveys which were carried out in 2010. Difficulty was also acknowledged in the estimate of household production for self-consumption, a sector which in the Russian Federation contributes more than 9% to GDP (Ustinova 2009, 7). The frontier with the economy which is alien to the definition of production used internationally is very easy to cross, because the production of wine, flour, meat, or milk for self-consumption is considered to be a part of the informal economy, as is "the production of services in households for the occupants". This refers principally to repairs, but the conceptual line which separates the repair of a roof from that of any other component of the tools of the household, such as for example a light-bulb, or a button that needs sewing is, without any doubt at all, very insubstantial.

Other national reports bring various different contributions of methodological interest. For example, in Latvia, it is estimated that the NOE is equivalent to 15.1% of GDP, if the estimate is made from the point of view of production, but only 10.3% if the estimate is

made from the point of view of expenditure; the sources are different in each approximation. In Lithuania, the share of the NOE in GDP is estimated at 14.3%, but in some sectors of economic activity, such as fisheries, it reaches 50%, in the property sector 24.1%, and in the health sector 25%.

The report on Mongolia includes two studies carried out using different methodologies in the year 1997 and in the year 2000. They produce estimates between 13 and 30% of GDP. A new survey was still in progress in 2004 to obtain new information. Reference to the activities in the transport sector in the capital of the country stated literally that “the traffic police estimate that between 5% and 7% of private vehicles are not used as taxis”. If there is no error in the drafting, it could be supposed that the remainder are indeed used as such, at least sometimes or part-time. This is a piece of information that deserves a preferential position in thinking about the limits of empirical research and the stimulating capacity of the imagination when faced with a lack of more conventional resources.

Apart from the UNECE, the analyses of the United Nations Economic and Social Commission for Asia and Pacific (UNESCAP) and the Asian Development Bank (ADB) on the non observed economy and the informal economy also provide interesting results, which are difficult to fit into international comparisons. The lexicon occasionally varies; for example, the NOE is known as the non-organised economy in many Asian countries, and has the same initials as the non observed economy (NOE). The OECD has estimated that the NOE contributes 40% of GDP in India, and 44% in the Philippines (OECD 2008, 15). In some countries such as India, collecting wood for the fire is included, but not obtaining water (OECD 2008, 16). In Asia and the Pacific (OECD 2004, 8) it is estimated that the informal economy contributes 40% to GDP in the non-agricultural sectors. Contrary to prior expectations, the available data show that the degree of participation of men and women in the informal economy is not very different, although it is probable that women’s share has been under-estimated because of the greater difficulty in obtaining the information.

In short, many different institutions of the highest standing are attempting to integrate the non observed economy into the macro-economic accounting tables, but the theoretical and practical diffi-

culties remain considerable and part of the effort has to be devoted to achieving a consensus as to what is being measured and how it is to be measured.

1.8. The quality of work: a comparison between remunerated and non-remunerated work

The poor conditions of hygiene and the high rate of accidents in factory environments at the beginning of the Industrial Revolution launched a social movement which demanded vigilance and improvements in health and safety conditions at work. Currently, both the International Labour Organisation (ILO) and the World Health Organisation (WHO) include this as part of their objectives. In Spain, the State Observatory of Working Conditions (Observatorio Estatal de Condiciones de Trabajo – OECT) is the heir to this tradition, and it is located in the National Institute for Health and Safety at Work (Instituto Nacional de Seguridad e Higiene en el Trabajo – INSHT). The Institute has carried out a periodic survey, the National Survey of Working Conditions, since 1987. For the first two decades, it gave priority to the observation of the medical, physical, and chemical features of the workplace. Methodological changes were introduced as from the VI Edition (2007), and the observation of psycho-social aspects was introduced: in the Report on the Results of that year a specific heading was devoted to social support, professional development and self-realisation, autonomy, job stability, pay, promotion and personal relations²¹. A specific epigraph was dedicated to the *mental load of the job* (degree of attention, clear information, attention to people from outside the establishment, speed, deadlines, perception of the workload, intellectually or emotionally demanding work)²² in the 2007 report results.

²¹ Report on the VI National Survey on Conditions at Work, 2007. The field work was carried out by Sigma-2 between December 2006 and January 2007. 11,054 interviews with workers in the agricultural, industrial, construction and services sectors.

²² A new survey was carried out in 2009, The National Survey on the Management of Health and Safety in Companies (ENGE 2009), orientated towards understanding the physical aspects of safety and preventative measures through questionnaires given to managers and administrators of companies.

The field of observation in the majority of surveys on work are limited to wage and salary earners, and the information available on other types of worker is scarce. There is very little information about the material and psycho-social conditions under which the non-remunerated work of the household because it is interpreted as a private sphere in which the intervention of the public authorities is not appropriate.

The results of the Working Conditions Survey for 2002-2003 almost looked like paradise. Less than 10% of those interviewed (8.4%) stated that they had suffered any type of violence at work over the previous year. Only 0.4% reported that they had suffered sexual harassment, 0.2% that they had suffered discrimination because of their nationality, race, or disability. 0.7% reported that they had suffered sexual discrimination. Within this very low level, the violence reported came principally from their own colleagues (49.4% of those reporting this), and reports of violence applied by superiors was three times higher at (37.4% of those reporting this) than by subordinates (11.3%). Other types of hostile behaviour, such as personal or professional disparagement (0.5%), obstructing communication (1.1%), and threats (0.2%) were also only reported by tiny minority (Table 1.11).

Although the survey was carried out during a period of economic expansion, such positive data awaken doubts as to whether the procedure employed for obtaining the information discouraged potential expressions of unease, or whether, on the other hand, it offers a trustworthy reflection of a general environment of great satisfaction. Whatever the case, it is normal for surveys on employment to show a high level of satisfaction. According to the Survey on the Quality of Life at Work (ECTV), carried out by the Ministry of Labour and Social Affairs in 2004, 90% of workers said that they were satisfied with their jobs, with an average of 6.79 on a ten-point scale. In the CIS Barometer survey of September 2010, the relationship with work (whether current or past) is positively valued, and only one and a half points separate this from the level of satisfaction with family relationships, and less than one point with respect to their partner relationships (CIS 2010 no. 2844).

As an instrument of observation, the Working Conditions Survey could not be extrapolated to non-remunerated work in the house-

TABLE 1.11: Violence suffered at the workplace
(percentage who state that they have suffered violence)

	Yes	No	Did not answer
Physical violence by persons belonging to the workplace	0.6	99.3	0.1
Physical violence committed by persons not belonging to the workplace	1.8	98.0	0.2
Undesired sexual attentions (sexual harassment)	0.4	99.5	0.1
Discrimination by age	0.6	99.3	0.2
Discrimination by nationality	0.2	99.7	0.2
Sexual discrimination	0.7	99.1	0.2
Discrimination by race or ethnicity	0.2	99.7	0.2
Discrimination by disability	0.3	99.5	0.2
Discrimination by sexual orientation	0.1	99.7	0.1

Source: Prepared by M.A. Durán using data from the National Survey of Conditions at Work, 2003.

hold, or to the volunteer work in NGOs, but it is a good starting point for the discussion and highlights the poverty of information in respect of non-remunerated work in comparison with remunerated work. This survey contributes to the delimitation of the working conditions which are considered to be important, whether the physical features of the workplace (risk of accident, physical effort, illumination, temperature, humidity, noise, pollutants, posture) or the social aspects (imposed rhythm of work, working hours, control by managers, lack of autonomy, lack of stability, difficulties in communication with others).

Grouped by topics, the principal results of the Survey of Conditions at Work in 2007, referring solely to remunerated work, were as follows:

Degree of satisfaction. A very high degree of satisfaction was expressed in the survey, and almost all conditions received a score of higher than four points on a five-point scale²³.

²³ All of the working conditions listed in the survey received more than 50% of replies, indicating that they were “not at all” upset, with the exception of that referring to posture, which only received 48.7%.

Physical risk. 10% of workers stated that they had suffered at least one accident at work over the last two years, and in some occupations (drivers, construction, mining, mechanics) more than 90% of workers stated that they were exposed to a risk of accident. The perception of risk is higher for men than for women because of their different sectors of occupation. It was also higher among immigrant workers than for Spanish workers.

Remuneration. 42% of the workers interviewed indicated that they received good pay, as against 26.2% who held the opposite opinion. 30% considered it to be neither good nor bad. Women, young people, and agricultural and industrial workers expressed a lower level of satisfaction with their pay than middle aged workers and those working in other sectors.

Promotion. One third of workers in 2007 believed that they had a good chance of promotion, while 40% considered that they had none, and the remainder did not give an opinion. 45% of women as against 35% of men believed that they had no chance of promotion. At that moment, just before the commencement of the crisis, the perceived perspectives were better in industry and in construction than in agriculture and services, which reflected the difference in opportunities in the labour market.

Job stability. At the date on which the survey was carried out (2007) the economic crisis was still not obvious, and the massive destruction of jobs was not even imagined, but the effects of increasing precariousness could already be seen in temporary contracts. An increased incidence of psycho-somatic problems was seen (sleep disturbance, tiredness, head-aches) among workers who believed that they would probably lose their jobs. Only 14.5% of workers believed that it was probable that they would lose their jobs within the following six months, 68.5% thought it was improbable, while the remainder did not answer. Compared with other, earlier, surveys, the perception of insecurity had already increased²⁴.

²⁴ According to the IV National Survey on Conditions at Work, carried out between October 2002 and January 2003, by agreement between the Institute of Social Security and Hygiene at Work (Instituto de Seguridad Social e Higiene en el Trabajo) and the CIS, workers highlighted the inconvenience of the monotony (8.7% of references) more than instability of employment (8.4%). Report prepared by the Institute for Social Security and Hygiene at Work (Instituto de Seguridad Social e Higiene en el Trabajo), p. 247.

Length of the working hours. The length of the working hours was very variable; on average, according to this survey there were 44.6 hours per week in the agricultural sector; 42.5 hours in construction, 41.2 hours in industry, and 38.7 in services, a sector in which a large number of women work. The average working hours, over all sectors, was 42.15 per week for men, and 36.7 hours for women.

Travel time. It is most frequent for people to spend from ten to twenty minutes per journey in travelling to work (31% of workers), but 40% exceed this time. 4% of workers spent one hour or more each way. The time spent on the journey from home to work (one journey) is greater for young people, for those who work in construction, for immigrants, and for those who work in establishments with a large number of workers on the payroll.

Human relationships. 76% of workers valued the human relationships positively, and only 7% gave a negative valuation. Negative human relationships also displayed an increase in declared psychosomatic illness.

It would be difficult to make a comparison between the conditions at work observed through this survey and the conditions under which non-remunerated work is performed in households, even were the same questionnaire to be applied, because the same words would mean different things. Furthermore, to date there is no periodic survey devoted to non-remunerated work in any country. One of the conditions which makes remunerated work outside the households different from non-remunerated work performed in the households is the degree of specialisation and the possibility of splitting and delegating tasks to other workers. In the advanced economies, both in the services sector and in industry and construction, there is a high degree of specialisation which includes knowledge of technology and the use of machinery. The division of labour is not so pronounced in agriculture, but it is also much higher than in households. Almost all paid workers have a well-delimited field of activities, obligations, and compensation, and the tasks which they are not obliged to do, and those which they may delegate to less qualified or lower level workers are specified. This is not true of non-remunerated domestic work, and those who take responsibility for it at home usually carry out all of

the tasks which make up the domestic work throughout the course of their lives.

The easiest aspects of comparing remunerated work and non-remunerated work are the “physical” and “environmental” ones such as physical effort, illumination, temperature, noise, pollutants, and ergonomics. Household appliances have contributed to reducing the physical effort of household work in the developed countries, and therefore the conditions would be comparable to those of an average job. It is not work which is free from risks (burns, falls, cuts, poisoning, etc.), as is witnessed by the high proportion of accidents which occur in the home, but neither is it more risky than the average. In households with a low level of income and insufficient provision of infrastructure, however, domestic work can reach high levels of physical hardship.

“Travel time” would have little meaning in the case of households given that in the great majority of cases the work is carried out in the premises where the person lives. Nevertheless, the time accumulated every day, above all in urban areas, in the small trips which are involved in purchases, official business, and transport accompanying other members of the household, is not inconsiderable.

The possibility of “promotion” clearly separates non-remunerated work and remunerated work, although not to such a clear extent as may appear at first glance. With remunerated work, promotion constitutes personal recognition which normally entails better remuneration, more prestige, and more power. There is no equivalent to this in the non-remunerated work in households, although there do exist indirect forms of remuneration (the contribution to the family economy), of collaboration in the induced promotion of other members of the household, improvement social prestige, perfecting qualifications, and increased power in inter-family relationships. But non-remunerated work in the household does not have a personal career horizon independent of the family situation, and that makes it profoundly different from work in other occupations, even if only at the level of expectations. As has already been seen, the majority of earners do not have any expectations of promotion in their employment either, but there is one third of them who do recognise them, and there is a much greater number who have at some moment in their working life had or believed that they had such expectations.

The concept of “stability” in respect of a job means continuity in the employment relationship and, as a corollary, maintenance of the remaining working conditions, including remuneration. It is not possible to transpose this concept to the non-remunerated work in the household without specifying how it is applied. As an activity to which time is devoted, non-remunerated domestic work is very stable. For many workers it is almost as long as their own life cycle, because it is not even interrupted by retirement. Nevertheless, continuity in the degree of dedication to non-remunerated work does not guarantee the continuity of the financial partnership with the remaining members of the household. In households where there is a strict division of labour, together with the full and exclusive dedication by one of the family members to the non-remunerated work of the household, the rupture of matrimonial relationship, widowhood, or the emancipation of the children can be the equivalent of the loss of a job. In fact, at times of economic expansion, these occurrences are more probable than unemployment itself²⁵. Households with a strict division of labour are more vulnerable to the economic crisis, because the risk of unemployment is not shared between the two spouses.

Non-remunerated work is, by definition, without “remuneration”. This does not mean that it is without economic value, nor that those who carry it out do not contribute to the economy of the household, but simply that it is not converted into the compensation of an immediate direct payment to the person who performs it. The real economic contribution of non-remunerated work may in many cases be higher than what is managed by the worker who goes into the labour market; but what it never entails is immediacy, individualisation, and the sense of regularity and availability which are characteristic of a wage.

The “type of working hours” is employed principally in order to differentiate between full-time workers and part-time workers. In comparison with remunerated work, the working hours of non-remunerated workers is very varied. Few working people devote two or

²⁵ Paradoxically, in Spain the economic crisis has had the effect of lowering the number of separations and divorces. Couples can no longer afford the luxury of a court case, the payment of alimony, or the duplication of housing.

three hours a day to their work, but this is a frequent circumstance in non-remunerated work, particularly among men. The duration of remunerated work is determined relatively easily by means of presence at the place of work, but the duration of non-remunerated work is more indeterminate because of its discontinuous nature. The greatest difference between the duration of the working hours of remunerated work and non-remunerated work arises in the case of public holidays and vacations. Non-remunerated work continues longer throughout the day, it is frequently performed at night, and it extends beyond the theoretical age of retirement. As a unit of measurement, in the case of non-remunerated work working hours per week is a more significant unit than hours per day. Moreover, for many purposes, other units of account referring to longer periods have to be used, such as the duration of working hours per year, and the duration of the working hours throughout a whole life.

Regardless of whether the working day is full-time or part-time, the concept of the working day acquires a different meaning when it refers to remunerated work or non-remunerated work. The former is analysed in itself and on its own terms, without paying any attention to whether or not it is potentially superimposed upon, or aggregated to, non-remunerated work. Non-remunerated work, on the other hand, is usually analysed from a more integrative point of view, which covers remunerated work at the same time. It is not the non-remunerated work which is of interest so much as the workload of the people who perform it; that is why the key concept is not that of the duration of remunerated work but the *overall workload*, which is the total amount of work done by the worker whether or not remunerated. It is what is known, from another standpoint as the *double working day*. For many workers, in particular, women, the double working day is not a freely chosen option if it lasts so long as to lead to exhaustion. But they prefer the double working day to the single working day, whether in the remunerated job or in the non-remunerated work. The double working day is the high price of the new personal identity and of social integration (Durán 1986).

The most difficult aspect to analyse in the working conditions, which would require both qualitative and quantitative studies, is that of the quality of the human relations. In households, very close human and emotional relationships are forged, both positive and

negative, which cannot “cool down” or be resolved simply by changing jobs. Taken together, the relationships which serve as the basis for the non-remunerated work in households are good and in many cases excellent, but it should not be forgotten that there also exist relationships of dominance, conflict, and in the worst cases psychological or physical violence. The statistics for divorce and separation are an indirect indicator of the degree of conflict or dissent which arises between spouses in their households. There are also forms of filial conflict and between other family members²⁶. In Spain, INE has completed statistics on nullifications, separations, and divorces through an agreement with the Courts; in the year 2009 the average duration of dissolved marriages was 15.6 years. The number of dissolved marriages was 106,166. According to provisional data from the local census in 2009, that year there were 91,581 church weddings, and 80,174 civil weddings, and therefore it can be concluded that more than half of the total will end up in divorce or separation.

1.9. A “decent job” for all?

The International Labour Organisation considers that the duration of the working hours in a “decent” job²⁷ must take five criteria into

²⁶ In the Christian tradition, serious filial conflict already appeared in the first generation with the result of the killing of Abel by Cain. And the interpretation of the expulsion of the founding couple from the Garden of Eden because of Eve is a form of assigning culpability which was the forerunner of all kinds of subsequent psychological and ideological aggression. In a more empirical and more recent approximation, the CIS in study no. 2844 (September 2010) found that the majority of the population almost always feels comfortable in their family relationships (67.8%), and a quarter (22.5%) feels comfortable “most of the time”. Only a tiny proportion (0.3%) said that they always feel uncomfortable or ill at ease, and 8% sometime felt comfortable and sometimes not. Evidently this is an indicator of the family environment, because it only refers to moments when people are with their families, which is relatively optional, above all in the case of family members with whom people do not live together. In other words, this does not refer to the entire extensive family, but to those family members with whom people interact and when they interact. The index of satisfaction expressed increase with age (56% of those of less than 24 years of age felt comfortable with their family almost always, while 75% of those over the age of 65 did so). This is only an approximation, and is not an indicator of the degree of satisfaction with non-remunerated work when it is carried out at home, and does not have an exact equivalent in the working environment at centres of production.

²⁷ The concept of “decent” translates badly from English into Spanish. Although the words appear identical, they have distinct connotations. In common use the Spanish term

account: safeguard health and safety, favour the family, promote equality between the genders increase productivity and foster the freedom of choice of the worker in respect of their working hours (Lee, McCann, and Messenger 2009, 47). These conditions are optimal models which the ILO is attempting to bring to reality, while simultaneously recognising that the goal is difficult, in particular in broad swathes of informal sectors in the developing economies.

The difficulty in establishing a “decent job for all” rests basically on the different competitive capacities of different companies and different countries. The principle that every worker should enjoy Social Security and decent working conditions is being pursued by the ILO and meets with frontal objections from nobody; nevertheless, many developing countries have objected to the social regulations being applied by the World Trade Organisation (WTO) for fear that their own exports would lose international competitiveness. What is interpreted by the developed countries as social dumping is seen from some quarters as a form of protectionism against the developing countries. Under very unequal conditions of productivity (technology and capital) they accuse the developed countries of having forced them down in the social regulations in order to maintain the international competitiveness of their products. The campaign for a decent job at the level of a specific place of work in companies has no sense at all if it is not accompanied by action which extends it to the entire working environment, including non-remunerated domestic work (Ferensechild and Wick 2004, 54).

In the year 2009, the number of unemployed people in the world reached a figure of 212 million persons, thirty-four million more than in 2007 (ILO 2009a), which reduces the probability that the campaign launched a decade ago by the International Labour Organisation to achieve “a decent job for all” will achieve its goals. Spain is a good observation point for the development of working conditions, particularly unemployment, because it combines an in-

“*decente*” carries a heavy moral load, even of sexual morality, and this is not true of the word in English. Translation of the English word by “*digno*” would be more appropriate, although still not free of difficulty. In practice the translation of “decent” by *decente* has become established in the official documents, although some authors prefer to translate it by “*trabajo de calidad*” (“work of quality”) or “*trabajo digno*”.

come per capita typical of the developed economies with an official figure for unemployment which is in excess of 20%, and among young people of less than 25 years of age it soars to 40%, and among immigrants, 28% (Arango, Oliver, and Aja 2009).

Just like all political proposals of a broad scope in which a multitude of institutions participate, the campaign for a decent job is attractive and, at the same time, evanescent. Easy to love, but difficult to implement “or measure”. The ILO describes the campaign for a “decent job” as the sum of people’s aspirations throughout their working lives, their aspirations for opportunities and income; their rights, their voice and recognition; family stability and personal development; justice and equality of the genders.

These are expressly recognised objectives and the ILO is confident that it will win the support of all workers without differentiation between those who work in the formal economy and those who work in the informal economy; men and women; those who work for a wage and those who work for themselves; those who work in the country, in factories and in offices. Additionally, and this is the most innovative aspect of the programme and is what ties it directly with the following pages, of those who work in the community and those who work in their own homes.

Nevertheless, from a global point of view, such as the ILO must necessarily have, equating work conceptually with the employment relations characteristic of the advanced economies makes little sense; and this is acknowledged in a large number of reports and publications of the institutions itself. Work with regular hours, high well-consolidated pay, with Social Security cover for periods before and after the working life, favourable environmental conditions and opportunities for progress, is an ideal to which all workers aspire, but for the moment only a few achieve. Even in the developed economies working hours which are spent in such an idyllic framework such as this is a minority and only some workers and only in some moments of their working life manage to enjoy them.

The working conditions in any specific workplace are interdependent of what happens in other places: factories, offices, the country, they all depend upon their mutual relationships, but also on what is happening in the home and in the Public Authorities.

Working conditions in any place on the planet are already interdependent upon what is happening in other places however remote, and not only upon other workers who are producing similar or competitive goods and services, but also on upon households and States.

1.10. The unions and the representation of the workers of the future

1.10.1. New workers with multiple obligations

The average profile of the paid worker of the 21st century is becoming more and more complex, a phenomenon which is already recognised in political proposals such as the Treaty of Lisbon (2007) or, with greater emphasis, in the Strategy for Europe 2020, in which the workers' contribution to the cohesion and recovery of post-crisis Europe is highlighted. They carry out many social roles simultaneously and these confer obligations and rights, and require a delicate balance in the use of time. Complexity is added to the profile of the average worker by:

1. Women joining the workforce.
2. Generalisation or higher valuation of shared family responsibility between women and men.
3. Workers from other cultures of work joining local employment markets, both nationally and internationally; geographical ties to employment are opening up to the possibility of geographical mobility.
4. The growing importance of education and training as productive factors, which gives rise to workers frequently being simultaneously or alternately devoted to employment and to studies.
5. The extension of the average age of workers, together with a reduction in the physical difficulty of their tasks. Workers of mature age and workers who suffer from some type of disability which does not prevent them from carrying out their work are contributing more and more to the average profile of the worker.

6. The increase in social obligations related to the management of citizenship (civic rights and duties), and public and private bureaucracies.
7. The growing importance of the social roles associated with hedonism (*Homo ludens*) and the management of consumption.
8. Growing occupational mobility which shapes workers who are identified not only with the job they actually do, but also with the jobs which they expect or hope to do in the future.

1.10.2. Foreseeable changes in the agenda of union organisations

Workers need representatives in order to maintain their collective relationships with greater negotiating power with other economic and political organisations. The principal representative organisations of paid workers are the unions and their contribution to the improvement in working conditions has been decisive over the course of the 19th and 20th Centuries. In the 21st Century, the representative organisations will have to adapt to the changes which have occurred between the workers and those who represent them²⁸. In the developed countries and also in the developing countries, the principal changes are an increase in the average level of education, a growing affiliation to the services sector, heavy participation by women, the presence of large numbers of migrant workers, and the survival of the informal sector. Towards the middle of the 21st Century, many workers will be elderly, almost half will be women, and one out of every five will come from a foreign country. The internationalisation of work is a complex challenge for union leaders, because the labour market is already in fact a universal market in which everybody is competing against everybody else. The defence of working conditions in the local labour market, particularly in times of crisis, involves regulating the number of workers, a phenomenon which could easily derive into the closure of borders for workers from other parts of the world. This is the principal ethical

²⁸ The general secretary of the International Trade Union Confederation (ITUC) publicly stated the need for women to take up employment, with the ensuing organisational changes (Ryder 2010).

dilemma which the union organisations must face, with the prioritisation of the interests of the local affiliates and those of foreign workers who aspire to join the local market.

Informal work, as has already been explained, is more frequently found throughout the world than formal work. The ILO indicates that the unions have sometimes been accused of not responding to the interests and needs of informal workers and of focussing their activities on the wage earners of the larger work centres. In economies in which there is public money in the capital of large enterprises, labour conflict does not mean a confrontation between the labour force and the private ownership of capital, but between one sector of the labour force and all other workers who sustain the State through the taxes they pay, or are sustained by the State through the benefits it provides. At least in part, an improvement in the working conditions of some is achieved by removing resources from others (pensions, health services, subsidies to other sectors in deficit, etc.). Nevertheless, the unions are not immovable institutions. It is the role of the workers themselves, whatever their employment situation, to decide on how they wish to organise themselves. However much their historical legacy and the inertia of the institution itself may weigh upon them, the unions are open organisations in which there is room for initiative and innovation. As the ILO says, "innovative strategies" are required in order to reach the "invisible workers, the dispersed workers who are difficult to contact, often with a low level of education" (ILO 2002, 96-97), a phenomenon which corresponds to the profile of informal workers, and also to that of workers who care for dependents in their own family without remuneration. Awareness campaigns are necessary in order to convince workers of the advantages of becoming an affiliate, or organising. In a survey carried out by the women's committee of the International Confederation of Free Trade Unions (ICFTU), 72% of non-unionised women said that the principal reason for not joining was that they could not see how the union could help them.

In Spain, with reference to organisations which employ workers, the principal change is their internationalisation, and the growing weight of the public authorities and public companies in the employment of workers and in the direct or indirect regulation of the working conditions. Changes in the composition of the people be-

ing represented affects the entire union structure, the manner of recruiting, the means of communication, the prioritisation of items on the agenda, the design of strategies of alliances and hostilities, the models of leadership, and the training systems for middle management.

The unions know that the majority of the public will spend more years of their adult life in the pre-employment and post-employment phases than in being in employment, and they therefore have to define strategies for relationships with broad sectors of the population who remain outside their immediate field of action. The *unions* are vehicles for the expression of social needs, but the concept of need is less simple than our frequent use of it in daily speech would lead us to believe. The conversion of a need into an organised demand and into a social challenge is not automatic. When it is put through just a little analytical process, it leads to a long list of questions: who is experiencing the need, their degree of awareness of the need, precipitating external factors which foster the appearance of awareness, and their means of expression.

In the process of converting the need into a demand, it is indispensable to identify other persons in addition to those who experience the need; these are the people to whom the proposal is to be addressed. There may or may not be a process of intermediation by third party agents: technical-experts, specialists, social mobilisers, antagonists, potential allies. Leadership of the demand could lead to other people than those who experience the need. Their goals can remain faithful to the need which gave rise to them, or lead towards other social agents who could take them on and make use of them to resolve their own needs.

The need to reconcile working life, family life and personal life may or may not be felt by those who in fact do experience that need. There are subjects installed in the unconscious, and in the false consciousness, and that applies both to those who experience the need and to those who say that they represent those people.

The opponents, or at least those who receive the demand, are different in the field of family, personal, and employment needs. Family needs occur in more and more diffuse circumstances and it is not an easy matter to identify the people who experience the need, because they may equally be relatively autonomous adult per-

sons who can express the need as their own, or persons with little capacity for social vertebration and for the defence of their claims (children, the sick, and the elderly). Or they may even be other autonomous adult persons who hold others accountable in the private and family sphere as a condition for maintaining a distribution of roles which is not accepted by mutual agreement (marital and partnership tensions).

The unions have a long history as articulators of social needs, as converters of needs into organised demands. Nevertheless, their historical experience has tied them very closely to the sphere of employment, and still closer to large enterprises and to wage earners. The commitment of the unions to the defence of the working conditions of those in employment does not always contribute to the creation of jobs for those who do not have them. The representation of the interests of women, of women who aspire to employment, of women already in employment, those who are union members, and those who are part of the union organisation, is a chain in which any of the links may break, or even when it is in perfect working order may not be perceived as such. If the achievement of equality between the genders is a social challenge for the unions, the adaptation to a new type of worker, for whom the reconciliation between family, personal life, and employment is a need as primordial as the working hours or pay, is an internal challenge.

The unions will have to adjust to the fact of the progressive increase in the proportion of the population who cannot look after themselves but need help from others to survive. They will have to decide between sticking to the specific employment sphere of jobs, and taking on tasks of a more general nature, such as the very model of the production system in which they share the limelight with those who possess the means of production, the company administrators, and the administrators of public goods and bodies. Among other lines of action, they will have to reach agreement with the other social agents in respect of the distribution of the workload of caring: agreements and negotiations in which the public services will play their part (innovation in the type of services and provision, in financing them), as well as companies, the financial institutions, and the associations which represent the dependent people and the people with whom they maintain financial and emotional relations.

In order to do this, the first step will be for them to incorporate new concepts of the family into their strategies, with new types of relationship between men and women, and new forms of intergenerational relationships. Nevertheless, workers who are not in employment (the unemployed) and those who work without remuneration are for the moment without strong representative organisations, and it is very difficult for them to achieve prominence in negotiations with other social sectors that are better organised and have a greater capacity to threaten and create social conflict.

2. The hidden giant

2.1. Two thousand million workshops producing services round the clock at the margin of the market

A *household* is a workshop which produces services around the clock, protection and safety services, companionship, education, gender, social representation, rest, food, health care, and sickness care. A long list of non-monetarised services which continue even when the members of the family are asleep or are out of the house.

Households are workshops which produce services, and no other productive sector matches it in terms of volume and economic importance. All other economic institutions have been invented in order to satisfy the needs of people and of the small nuclei into which people are organised; and the economy and its entities should be for the people not the other way around.

The Spanish word “*producir*”, to *produce*, is defined by the *Dictionary* of the Royal Academy of the Spanish Language (DRAE) as “(1) generate, procreate, bring up, breed. Properly speaking it is used to talk about the operations of nature, and by extension to acts of understanding”. And it also means “(2) and (3) yield, earn interest, benefit, or annual profit”, “(4) provide a favourable result in the value between price and costs”, and “(5) fabricate, manufacture useful things”. More than in the positive sense, the ideological connotations of productivity can be seen most clearly in the negative sense. In everyday usage, the adjective *unproductive* is usually applied to fields which give no crops, mines of poor quality, over-fished seas,

badly organised companies or government administration. When used to refer to human activity, the term *unproductive* never has positive connotations, and in the most neutral sense only means that it produces no money, or that it belongs to a world unconnected with gain and profit; but in the majority of cases, when an activity is labelled *unproductive*, it means not just that it does not generate any money, but rather a cost. To a certain extent, if something is unproductive, it is suspected of being parasitic, of being a sly and opportunistic consumer of resources. And there is no shortage of occasions in which the unproductive lies under a shadow of guilt, and moral suspicion. These nuances are not habitually expressed clearly in everyday language, nor in academic or political circles, and it is therefore necessary for them to be made more explicit, for them to be discussed and clarified. It is for this reason that putting the concept of *production* at the head of this chapter, and associating it with the home, means that an explicit position has been adopted.

There are something like seven thousand million people in the world today, grouped together into two thousand million homes. The average is 3.7 people per home, a fact which reveals little about the major differences which occur in real life. The need to obtain internationally comparable data forces us to make our definitions homogeneous, simplifying the precise and subtle nuances which identify the forms of family living and groupings.

In the developed regions, the number of households grows at a proportionately greater rate than the population, and the number of dwellings grows more than the number of households. Europe leads the trend to individualisation, of which single person households are just one manifestation. For example, between 1998 and 2007, Spain went from 12.6 million to 16.2 million homes. In the context of increasing wealth, the household is losing importance as a cost reducing mechanism in the production of shared services.

2.2. The family structure of households

2.2.1. New types of household

Households are classified by applying various different criteria, one of which is the relationship between their members. There is an

enormous richness of forms of relationship, although statistical offices publish very limited disaggregations in order to facilitate comparison. Two criteria for classification are shown in Table 2.1, the first of which is by types of household, and the second by types of relationship, which makes absolutely clear the diversity of the forms of family

TABLE 2.1: Criteria for the classification of households and relationships within households

Type of household United States census	Types of relationship within the household Mexican census*	
	First level	Second level
1) Households made up of couples - Couples with children - Couples without children	1) Head 2) Wife or partner	Includes: Husband/Wife de facto Common law partner Mistress Lover
2) Single-parent households		
3) Single-person households	3) Son/Daughter	Includes: Blood relation Acknowledged Adopted Stepchild Informal foster child
4) Other types of household	4) Domestic worker 5) Not related to head 6) Other relationship 7) Guest 8) Relationship not specified	- Domestic worker - Relation of the above

*The differentiated categories of domestic worker in the Mexican Census are: Domestic worker, domestic servant, maid, employee, domestic service, service staff, servant, domestic assistant, domestic helper, houseboy/housemaid, chambermaid, cook, laundry staff, nanny, wet nurse, boy, gardener, valet, watchman, porter, driver, housekeeper, butler, ladies companion, companion

Source: United States Census and Mexico Census, 2000.

life and of the criteria available to classify them. The first is from the United States Census, and the second from the Classification System of the Mexican Statistical Institute, Census for the year 2000.

The classification of the United States Census offers three types of household, one of which is subdivided, and a fourth type which is a catch-all for families which do not fit into the first three. The types of relationship and the subcategories of domestic workers who are included in households in the Mexican census are a reflection of a social structure which is very different from that of the United States. In the event that other societies, which are more distant from the western industrial model, in particular in rural societies, are brought into the picture, the differences between the types of household and of family relationship would be even greater, although these are not reflected so much in statistical publications as in anthropological ones.

The type of family based upon a nucleus of affective relationships and which shares the living space and other economic resources between its members is rapidly giving ground to other forms of social and economic organisation of the family. The increase in life expectancy has contributed to a rapid reduction in the weight of traditional households made up of parents and children in the total number of households. This type of household no longer represents the essence of the home, but is rather a stage within the life cycle. Households made up of couples without children are more frequent than those comprising couples with children in many developed countries (United States, Japan, Denmark, France, Germany, the Netherlands, Sweden, the United Kingdom, etc.). This majority type of household without children corresponds to very young households and mature households where the children have already been emancipated.

In the developed countries single parent households are growing unstoppably. Regardless of their marital status, within a quarter of a century the proportion of households with a single parent has virtually doubled²⁹ with respect to the total of households with chil-

²⁹ The definition of *niño* ((small) child) most frequently used in statistics is that of a person below the age of 16 years old, but some countries also include children of 16, 17, or 18 year of age who are in full-time education, or children of any age. In France children

dren. In 2008, more than one fifth of households with children were single parent homes in the United States (29%), Canada (25%), the United Kingdom (25%), Ireland (23%), Sweden (21%), Denmark (21%), Germany (21%), and France (20%). The proportion is not so high in Japan (10.2%), but it has doubled over this period. In Spain, the aging of the population has given rise to an inverse single parent situation, with elderly parents who take up residence in the home of one of their children; this is the case of 25% of elderly people over the age of 85 years of age, against only 1.2% of those of 65 years of age (CIS 2006).

Another type of household which is in fierce competition with the traditional home in the developed countries is the “single person household”, both because of the increase in widowed elderly people and because of the increasing financial capacity of the unmarried and divorced population to live independently of other family members.

There a certain degree of debate as to whether single person households can be considered to constitute families. For statistical purposes, some countries do consider them to be families, although the majority of countries require there to be at least two people. The discussion does not have much point, because on the one hand people who reside in single person households usually have family in other households, and on the other, because there exist relationships involving living together which are not based upon affective criteria, even when there may be blood ties or kinship. In many countries single person homes exceed the number of homes in which parents live with children (US Census Bureau 2010). In the Scandinavian countries single person homes form almost half of the total number of homes. In Germany they form 39%; in the United Kingdom, 35%, and in France, 30%.

From the point of view of non-remunerated work, the trend towards single person households implies a new distribution of productive effort. Women who live alone do not take on the care of other members of their family with the same immediacy as women who live within more traditional families. At the same time, in house-

are included up to the age of 25 years old. The English word “*child*” is not an exact equivalent of the Spanish word “*niño*” and depending on the context may be equivalent to the Spanish word “*hijo*” (≈ “offspring”), rather than “*niño*”.

holds without a spouse, it is more difficult for the traditional distribution of work by gender to occur. The reduction in the number of persons per household in principle affords relief from the load of domestic work, but this effect can be neutralised and even counteracted by the loss of cooperation or division of work with the remaining members of the household, the loss of economies of scale, and in other cases by a parallel raising of the standards demanded or of the quality of the services produced, for the most part for self-consumption. To the extent that the single-person nature of the household does not entail a rupture of relations with other members of the family or intimate friends, the spatial separation increases the time devoted to such relations by the time inevitably invested in travel between the homes.

“Temporariness” is another criterion for the classification of home-sharing. In Spain, as a consequence of the improvement in social and economic conditions rotating home-sharing is in the process of disappearing. The rotation of dependent members of the family, generally the father or the mother, between various different homes used to be commonplace among families with limited means as a strategy to share out the cost of care. Still, today, in the case of people from 65 to 69 years of age, 0.1% practises this form of home-sharing, a percentage which increases to 2.3% among those older than 75 years of age (CIS 2006). Similar in respect of the fact of the accommodation but often very different in respect of content, is the situation of the elderly who live in their own home but spend periods in the homes of their children (2.2% at 65 years of age, and 6.3% at 85 years of age).

2.2.2. The network of users of non-remunerated work: cohabiters, close family, and extended family

2.2.2.1. Cohabiters

The *household* is a unit of occupancy of a dwelling, in the same way as the *family* is a network of social relationships. To a large extent they overlap, but the family is more extensive than the household, and there is a strong tendency towards internationalisation, both because of international migration and adoption and because of the marriage or cohabitation of persons of different nationalities.

People who share a dwelling constitute the immediate network of users of the same spatial resource. Spatial proximity is a facilitating condition for the exchange or donation of non-remunerated work to occur. Nevertheless, the increase in geographical mobility and the great size of cities render it difficult to provide care services in family networks, particularly for the elderly population. In Spain, the geographical dispersion of the family affects men and women in a very similar manner: 7.4% of the population have all of their family in a different town from their own, and 16.2% have the greater part of their family living elsewhere, which adds up to a quarter of the population with scarce family resources residing in the same place. Only 28.3% of the population have all of their family residing in the same town, but this is a number which has to be adjusted downwards as far as availability is concerned in the case of major cities in which travel time makes direct contact on a daily basis unfeasible unless the family live in the same district (CIS 2010a). In Spain, homes with reduced nuclear families predominate, and the size of the unit is even smaller in the case of the elderly. In the case of the population of between 30 and 65 years of age, the most frequent case is to live in a stable couple, or, to put this in other words, to share the space in the dwelling intimately. On reaching the upper limit of this period, 74% of people live in this manner. At 85 years of age, nevertheless, the most frequent situation is to be widowed (71%), because only a quarter of those who reach this age still have their partner (CIS 2006). Taking people of between 65 and 69 years of age, 14.7% live in a single person household, and this proportion increases to 23.7% among those older than 85 years of age, who are those who are most in need of the physical proximity of their potential carers.

The type of household and the type of home-sharing is adapted to the feasibility of the alternatives, and is inseparable from the situation of the family and the position which each individual occupies in their life cycle. A recent study by the CIS has thrown up information on the structure of residential relations preferred by the population above the age of eighteen years old. A bare majority of scarcely over half (51.4%) prefers to live with their partner and children following the model of the bi-generational nuclear household, but more than one quarter (28.3%) prefer to live alone with

their partner (whether or not married), without children. This is a modality which is less common from the age of twenty-five years old, and flowers once again strongly after the age of fifty-five years old; for the younger group it reflects the desire to become independent of their parents, and for those in middle age, the desire to become independent of their children.

A tenth (10.8%) of those interviewed prefer to live alone, a fact that leaps to the attention because those who are doing so and those who want to do so do not coincide (CIS 2010a)³⁰. Other small percentages would like to live with their children, but without a partner (2.5%), or with their parents (3.3%) (very young children or those whose parents are so elderly that they are equivalent to children). There are very few people who are in favour of living in shared accommodation with friends of either gender who are not partners (1.5%); there is no tradition of this in Spain, except during the student years. 2.2% of people over 65 years of age indicate as their preferred option that of living in a “home for people of their own age”. Among young people of less than twenty-four years of age, 21% would like to live alone, and 35% as a couple, without children; for these people a home represents a goal, an indicator of their independence. At the other end of the life cycle, among those of greater than 65 years of age, only 11% would like to live alone; for many of these people, autonomous living acquires a connotation of loneliness which young people do not attribute to it, but the elderly do. In fact, the number of those in this group who prefer to live with their children is almost as large (8.2%) as those who would prefer to live alone.

2.2.2.2. *The close family*

If defining a *household* is relatively easy because it rests upon the physical basis of the dwelling, the definition of the *family* is much more difficult, and more subject to ideological fluctuations. In origin, the word *family* derives from the Latin term *famulo*, a servant, and originally meant a group formed of the master and his servants. In some institutions in which the hierarchies are prohibited from

³⁰ In this study, 10% of those interviewed said that they lived alone at home, but this only overlaps partially with those who say they would like to live alone.

marrying, such as in the Roman Catholic Church, the helpers who assist the hierarchies are known as “family”. And there are more than a few jurisdictions such as that in Spain, in which the term matrimony is also applied to the publicly formalised union of two people of the same gender. With the increase in longevity and the reduction in births, reproductive relationships arise during an increasingly limited proportion of people’s total life cycle, to the extent that the time spent in family life dominated by emotional and sexual relationships which are not reproductive is growing proportionately.

Although the family unit most studied through surveys is the household, some investigations have deliberately used other family units as their point of reference. Thus, in the Survey on Times for Care which is analysed in this work (Spain 2009)³¹, the “close family” was selected in order to compare the results with earlier surveys carried out by the same institution, in which the home had been taken as the reference unit. The *close family* has no legal definition, and it is only a psychological term: it is made up of those family members with whom a special emotional and social proximity is recognised. The identification of the family members who share the same home offers no difficulty because that has a territorial basis, but the identification of those family members who are considered to be close family depends on many personal conditions and circumstances. The law (for the purposes of inheritance, the right to receive benefits, etc.) delimits degrees of proximity (first degree, second degree, and so on) but “closeness” does not correspond exactly with the degree, and also depends upon other criteria which exhibit a strong element of cultural variability.

Belonging to a family unit is symbolised principally by the joint celebration of important dates, such as Christmas or birthdays. According to CIS (2010a), 50% of adults in Spain say that they frequently celebrate these occasions with their family, as against 11% who say that they do so rarely or never. This is the indicator with minimum involvement, the most external. Participation in family

³¹ Carried out by the “Time and Society” Research Group of the Higher Council for Scientific Study, the Human and Social Science Centre (Consejo Superior de Investigaciones Científicas, Centro de Ciencias Humanas y Sociales).

events drops off with age, both because of a decline in the desire to communicate and because of the independence of residence, geographical distance, and a reduction in the number of family members living together. According to other indicators which are less ritualised and deeper, such as *discussing personal matters*, only 30% do so frequently, and this falls to 22% when it is a matter of visiting or staying over in order to see the family members if there is no special reason for doing so. This is compensated by other forms of communication which do not require physical presence, such as contact over the telephone or by internet (22% do this frequently).

Another definition of the *family* which is an alternative to that based upon living together in the same dwelling or upon the existence of legal bonds is that of the family as a “network of people who consider themselves mutually obliged to provide financial and social assistance”. In Spain, the feeling of obligation to take care of family members is intense, but only in respect of the closest family circle. The feeling of obligation to provide financial help to a family member who is in need of it may not be symmetrical with the perception of a right to ask for and receive it. Family members show their solidarity, affection and feelings of moral responsibility by means of donations of time and non-remunerated work more frequently than by transferring money.

The Survey on Times for Care (Encuesta sobre los Tiempos del Cuidado) (CSIC, Spain 2009) contributes some interesting data on the degree of intensity in family relationships. It is striking that 31.0% of women, as against only 23.8% of men should say that there are children of less than three years of age in their close family. A difference of 7.2 percentage points means that in reality women consider that there are small children in their close family by a proportion 30% greater than that of the men who think the same. Could such a large difference be attributed to objective causes, such as the greater frequency of female single parent families, or the greater proportion of grandmothers? It does not seem to be sufficient to justify a difference of almost one third, and there is no doubt that subjective factors play an important role. Possibly, women extend the limits of the close family beyond the limits placed by men. With respect to children of 4 to 16 years of age, the proportion of women who say that they have them in their family is also greater

than that of men who say they do. The difference is more than ten percentage points, which means that the proportion of women who consider that the circumstance applies to them is 23.5% greater than that of men.

Although not quite so accentuated, the difference between men and women who recognise family members as close continues in respect of those older than 74 years of age, and while 40% of women say that they have people of that age among their close family, only 34.8% of men acknowledge that they do (Table 2.2).

As a result of the fact that women more frequently recognise the existence of children, the elderly, and dependent adults among their close family, the accumulation of dependent close relatives turns out to be 23% higher among women than among men. Regardless of the manner in which the law delimits it, women classify their relatives as close family more readily, they are more sensitive to recognising illness and dependency, and consequently assume different types of obligations in respect of their family environment.

TABLE 2.2: People who say they have close family in these circumstances
(percentage)

	A ₁	A ₂	B ₁	B ₂	C	D
	Children of 3 years old or less	Children from 4 to 16 years of age	Adults with moderate dependence	Adults with high dependency	Older than 74 years of age	Cumulative, dependent relations*
Total	27.5	48.5	14.4	11.2	37.5	139.1
Men (M)	23.8	43.3	12.9	11.0	34.8	125.8
Women (W)	31.0	53.5	15.9	11.3	40.0	151.7
% W/ M	130.3	123.6	123.3	102.7	114.9	120.6
% M / W	76.8	80.9	81.1	97.3	87.0	82.9

*D is calculated as the sum of A₁+A₂+B₁+B₂+C. It is assumed that there is a family member in each case. There may be more than one, and therefore the minimum number of dependent family members is shown.

Source: CSIC Time for Care Survey, Spain 2009, carried out for the CS02008-04747 R+D+I Research Project, directed by M.A.Durán (CSIC 2009). Sample of 1,200 persons, national scope, greater than 18 years old, in personal interview. An express definition of "close family" was not given to those interviewed, and it was left to their own assessment.

2.2.2.3. *Extended family and social networks*

Throughout the world, family networks constitute the principal base for social networks, but they do not constitute all of them, as social networks also include neighbourhood networks, friendship networks, work colleague networks, and others. In Spain, the CIS has measured the size and type of social networks by means of indicators with regard to the number of persons from which the subject may seek help in different situations, such as care in the event they fall ill, a loan of money in case of need, talking to share a problem, help in finding work, or the care of small children if they have them. In all of these indicators, the network for men is wider than that of women. To take the case of care during illness, there is an average of 5.69 potential carers for men as against 5.01 for women. In the case of caring for their children, 3.64 as against 3.11. For talking about problems, 5.00 as against 4.46. For a loan of money, 3.79 as against 3.33. For finding work, 4.88 as against 3.37 (CIS, 2010a). The differences do not relate only to the environment outside the home, such as employment or obtaining a loan, but as these indicators show, to the enjoyment of the services of care and psychological attention inside the home. These indicators are complementary to, and not in contradiction with, those of the recognition of dependent close family members. Men consider that they would be cared for if they were to need it, while women accept the role and the responsibility for doing so, in the knowledge that they would have less probability of receiving the same attention if they were to need it.

Women find themselves more confined to the home, while the men form relationships not only with the people in their family networks but also in their non-family networks; the difference is not enormous, but it is still significant. On average, every man has daily contact with 17.70 people, including work colleagues and friends, while every woman has contact with 13.85 people. Of those, 4.88 are family members in the case of women, and 3.94 people are family members in the case of men. The men have a slightly higher proportion of relationships with family members of the same generation or older than the women, and the women have a higher proportion with the successor generation. The daily social network for men is 28% more extensive and the weight of family members within the network is on average one person less than for women.

In addition to the information on the volume of the social network, the study quoted provides information about its internal structure (CIS, 2010a)³². In the case of the intense and long-lasting care required in the case of illness, expectations are limited principally to the partner, but with a major difference between men (it is expected by 55.8%) and women (expected only by 39.7%); although it is true that this is the situation in which most help is expected of the spouse, more than one half of those interviewed do not expect that it will be their partner who will provide the necessary care, because they have none, or for other reasons. After the spouse, the next most important reference figure is the mother (23.4%), from whom help is expected in almost exactly equal measure by both men and women. Next in importance are the daughter (8.2%), the son (5.1%), and the sister (4.2%). Neither the father, the brother, the friends, nor the other relations are of any importance in this role.

When caring for small children, if there are any, help is expected principally from the mother (36.6%), and both men and women rely on this. It does not really seem to be very convincing that help is expected more from the mother (that is, the grandmother of the children) than from the spouse: this is probably due, at least in part, to a non-explicit interpretation of the question, as being about help under some exceptional circumstances, rather than the normal care which a child requires. Whatever the case may be, the answer is similar from both men and women, in that they both rely less on their spouse (14%) than on their own mothers for such help. An important role is also played by the sister (8.8%) and to a lesser extent by the mother-in-law (3.4%). Twice as many men as women expected help from the mother-in-law, as this is a network which is transmitted down through the female line. Hardly any contribution at all is expected in this area from the men of the family, or from friends either, although women expect more help from their friends (3.4%) than from their mothers-in-law.

³² The responses refer to all of those interviewed who said that they have at least one person but to not specify how many they have of the type of relationship to which the indicators refer (for example, they do not specify whether they have a father-in-law). With this caveat, the results are interesting in any case, because they reflect the complexity of the functions which social networks satisfy.

When talking about problems or alleviating sadness, help is expected from spouses in very similar proportions to the case of care in illness, with the same intensity and gender differences. Men expect that their spouses will care for them and listen to them, while women have very much lower expectations. Nevertheless, unlike the case of care in illness, friends play a major role in sharing problems, more than any family member other than the spouse. The role played by friends is very much conditioned by gender, in that men will tell their problems to a male friend (15.9%), while women will tell them to a female friend (16.5%).

Loans are not expected to be given by a spouse, probably because they form a part of the very economic unit which is in need of the loan: the most important roles in this case are played by the father (23%) and the mother (18%), followed by the son (8.7%) and the daughter (5.7%), a brother (8.4%) or a sister (5.2%), a male friend (3.9%), or a female friend (1.9%). The father-in-law is only mentioned by 1.2%, and the mother-in-law by 0.8%. In this matter, women always take a second place compared to men in the same type of relationship, but their role as potential providers is not trivial; since in general their earnings are much lower than those of men, that fact that they are taken into account as possible sources of financial support means that they have effective access to the money, or that in spite of not having such direct access, their propensity to give loans to family members is high.

As far as looking for work is concerned, the principal channel is through friends, rather than through the spouse or family members. Men believe that they could turn to a friend (29.9%) or to a colleague at work (6.7%). Although to a lesser extent, women also believe that it would be a friend who helped them to find work (15.1%), rather than their spouse or partner (13.5%).

2.2.3. The tax delimitation of the family

In countries with a developed tax system and public services, the delimitation of the family unit for tax purposes and the weight of the contribution of each member to the taxable income is a matter of economic interest, intensified by the growing frequency and legal recognition of *de facto* partnerships. Depending on the manner in which such questions are resolved in terms of tax, some families are

overtaxed, or on the contrary avoid the tax burden (Iglesias et al. 2009, 5; Moreno 2004, 17 et seqq.)³³.

Change in the forms of how families live together is reflected in the tax treatment of income, which is in constant evolution: for example, until individual tax treatment of members of the same household was permitted, the majority of families with two careers were very heavily penalised by Income Tax in Spain (IRPF) (Durán 1988, 189-193). Currently, Spanish tax legislation does not have a homogeneous classification of types of family; as may be seen in Table 2.3, the idea of the family implicit in the Law on Personal Income Tax (LIRPF) (Article 84) is not that same as that in the Law on Corporation Tax (Article 18.3), the Law on Inheritance and Donations, or the Wealth Tax. Over the medium term, the tax legislation will have to adapt to the fact that a major proportion of society holds beliefs which do not match the traditional model of the family which the tax regulations implicitly reinforce; among others,

TABLE 2.3: The concept of the family in the Spanish tax laws

Tax	Concept of the family
Personal Income Tax (IRPF) Article 84, IRPF Law	a) Married couple not legally separated and descendents living with them (non emancipated minors and dependent non-minors) b) Couples separated or without matrimonial bond and their descendents (ditto)
Corporation Tax (IS) Article 16.3 IS Law	Couples and relations in the direct line and collateral line up to the third degree and persons with a similar relationship to shareholders, partners, directors and administrators
Inheritance and Donations Tax	Spouse, descendents, adopted persons and relations in direct or collateral line
Capital Tax	Spouse, ascendants, descendents, and collateral relations up to the second degree

Source: Iglesias et al. 2009: 14. Revised by M.A. Durán.

³³ Regional differences in price levels and the discretion allowed to the regional autonomous governments in setting deductions generate scenarios of inequality between families of a homogeneous character.

polygamous families (in particular, those of Muslim immigrants of North African origin), couples living together without being officially married who are already responsible for more than one quarter of the children born each year, and couples of the same gender, who in Spain have the legal option of being married (Iglesias et al. 2009, 14).

2.3. Non-remunerated workplaces

2.3.1. Accommodation and dwellings

The *dwelling* is the physical and material basis of the home. Its construction and maintenance require considerable effort, and currently only 71% of the world population has managed to live in a permanent dwelling constructed to last over several years. The rest of the world population live in temporary dwellings, which are precarious, generally poorly equipped, insecure, and lacking in basic sanitary services. The world population is growing without interruption, and is maintaining the need to construct new dwellings (Tables 2.4, 2.5, and 2.6) and at a greater rhythm in the regions with the greatest deficit in housing.

In addition to the physical and material basis of the home, the dwelling holds a considerable symbolic value in that it delimits the personal space from others' space. In traditional societies, the house is identified with the family line, to which ownership and transfer between heirs gives symbolic continuity. In economically developed societies, the dwelling loses a large part of its status as representing continuity, and becomes an exchangeable good which is susceptible of monetary quantification. Although its exchange value is better understood than its value in use, this continues to remain high, and so does the symbolic meaning, both in respect of the construction and of the items of its contents (Durán 1988, 51 et seqq., 2003, 685, and 2008; CIS 1982)³⁴. Even in industrialised societies, a great part of daily life takes place in the dwelling, and this is particularly so for women (17.25 hours per day in the case of women, 14.54 hours for

³⁴ It contains information about the objects contained in the dwelling and the personalisation of the space by those living in the dwelling.

TABLE 2.4: The world population, 1980-2050
(in millions and percentages)

Year	Population	Annual growth rate	Annual population growth
1980	4,452	1.7	76.2
1985	4,852	1.7	83.7
1990	5,282	1.6	83.3
1995	5,694	1.4	80.5
2007	6,615	1.2	76.6
2008	6,691	1.1	76.8
2009	6,768	1.1	77.0
2010	6,845	1.1	77.2
2015	7,229	1.0	75.7
2020	7,600	0.9	71.6
2025	7,947	0.8	66.1
2030	8,268	0.7	61.2
2035	8,565	0.7	56.7
2040	8,840	0.6	52.1
2045	9,091	0.5	47.2
2050	9,317		

Source: Prepared by M.A. Durán using data from the US Census Bureau 2009.

men, according to the Time Budget Survey of the Basque Regional Government Statistical Office (Encuesta de Presupuestos de Tiempo, Eustat 2003) (Durán 2010a, 127). Within the dwelling, each space is employed in a different manner by men and women, by children and adults, in good health and in sickness, employed and unemployed. In the role of the home as a permanent centre for the production of goods and services, the distribution of information plays a leading part. The dwelling focuses the demands of the Government for communication by the public (postal services, inspections), the demands of private enterprises (advertising, verification of services, home deliveries, maintenance), and those of the family and friendship networks, which fall principally on the people who

TABLE 2.5: The distribution of the global population by continent, 1980-2050
(percentage)

Year	World	Africa	North America	South America	Asia	Europe	Oceania
1980	100.0	10.7	8.3	5.4	59.4	15.6	0.5
2000	100.0	13.2	8.0	5.7	60.6	12.0	0.5
2050	100.0	22.6	8.0	5.6	56.2	7.0	0.5

Source: Prepared by M.A. Durán using data from the US Census Bureau 2009.

TABLE 2.6: Population in housing with permanent structure

Region	Estimated percentage of population living in housing with permanent structure, 2002
World	71
Central Africa	76
South East Africa	29
North Africa	49
South Asia	53
Asia and Pacific	77
Middle East	78
East Asia	90
South America	47
Eastern Europe	66
North America	91
Western Europe	98
Japan	99

* *Worldmapper* 193 was made by a group of researchers, mostly linked to the University of Sheffield and to the Social and Spatial Inequalities Research Group, formed of D. Dorking, M. Newman, G. Allsopp, A. Barford, B. Wheeler, J. Pritchard, and B. Hening.

Source: *Worldmapper* 193 on data from national censuses circa 2006.

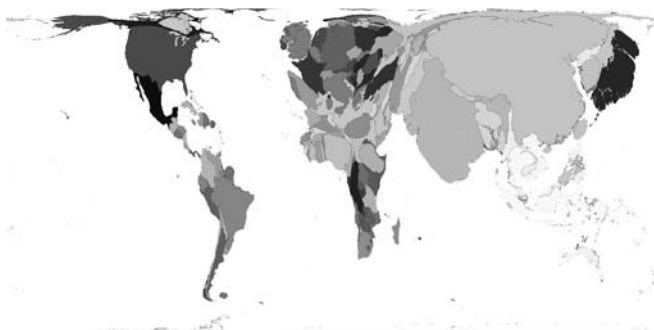
remain at home during working hours. These are short but frequent services which accumulate, which require availability to be able to attend to them, and which frequently prevent the exercise of other activities during this period of time.

Since knowledge of housing conditions is essential in the orientation of a great number of public policies, the ten-year population censuses are similarly censuses of dwellings. Some countries carry out exhaustive surveys of housing conditions with greater frequency than every ten years, but others lack the basic minimum of statistics; the United Nations and other international bodies are preparing the ten-year census of the change of the decade with technical and material support to carry it out in countries which are unable to put it into practice without that support (United Nations 2010a).

The distribution by continents highlights the enormous demographic weight of Asia, the growing importance of Africa, and the stability of Oceania and America, both in the north and in the south, and the declining role of Europe. It also shows the loss of demographic weight of the developed countries in the world population as a whole. The proportion of the world population which lived in the most developed countries was 24% in 1980; in 2010 it was 18%; and for 2050 it has been estimated that it will only be 13.5% (US Census Bureau 2009).

According to Eurostat, the basic criterion for defining the *household* is the “joint occupation of a dwelling or part of a dwelling, in which food and other essential goods for life are shared”. As distinguished from the household, the *dwelling* is “the normal residence of the household, that in which they normally spend the night”; but this idea is not without difficulties. The normal residence may be different from that used when the census is made, and moreover may differ from the tax residence. Some social groups are difficult to classify by their residence (UNECE 2008b, 65-66): among others, temporary migrants, people who have ties with various different residences, students in boarding institutions, people who live away from home on their working days because of their work, military personnel in barracks, children for whom guardianship and living are shared between their separated parents, the sick and institutionalised people, political refugees and displaced persons, nomads, the homeless, etc. (Map 2.1). Since the year 2008, for the first time in the history of the human race, more than one half of the world population has been living in urban areas (PRB 2010a).

MAP 2.1: Map of housing in the world



Source: Worldmapper, Map. No. 191. www.worldmapper.org.

Among the conditions of the home which determine the quality of life of those who live there, the censuses carried out around the year 2000 collected the following information (UNECE 2008 b):

- a) The characteristics of the building which contains the household (type of building, age of the construction, material of which it is constructed, number of floors, lift, state of repair).
- b) The general characteristics of the household (type of deed, district, occupation by one of more households, useful area, position of household in the building, number of inhabitants, number of bedrooms).
- c) Facilities (kitchen, running water, hot water, type of sanitation, bathroom, W.C., heating, energy employed in heating, electricity, gas).

In the census of 2010 (UNECE 2006, 107), the United Nations placed particular emphasis on the structural changes which are occurring in the formation of households, and on the two principal manners in which they are being interpreted: as *housekeeping* units, or as *dwelling* units. It is considered that a person who lives alone forms a household, an extremely important methodological decision for regions such as Europe where in many countries single-person households add up to more than one third of the total number of households.

2.3.2. Overcrowded households and empty dwellings

What each social group considers being an appropriate spatial limit for privacy and even personal distance is very much influenced by cultural and social factors, including the size and value of the extended family. The model of the dwelling cannot be the same for a person who wants few children and for people who are in favour of large families, nor for individualistic and communitarian societies. Hence the need to handle housing indicators with caution. One of the indicators most employed in evaluating housing quality is overcrowding, measured as the proportion of households in which two or more people live per room, not including bathrooms. As can be seen in Table 2.7, it has been estimated that 32% of the world population (53% by other estimates) live in overcrowded homes. The highest level of overcrowding is found in the South East Asian region (74%), and the minimum in Western Europe (2%). The distribution is not homogeneous in each region, nor in each country. In the more developed regions, overcrowding is concentrated

TABLE 2.7: Overcrowding in households in the world

Region	Estimated percentage of population living in overcrowded households, 2002
World	32
Central Africa	35
South East Africa	30
North Africa	38
South Asia	74
Asia and Pacific	37
Middle East	29
East Asia	8
South America	26
Eastern Europe	21
North America	9
Western Europe	2
Japan	1

Source: Worldmapper 192, using data from the United Nations Environment Programme, United Nations Development Programme, World Bank, and other institutions, *circa* 2002.

in immigrant households, and in social groups with low incomes. It is estimated that 77% of the population in India lives in overcrowded accommodation, while in Japan the figure is only 1%.

In the case of Spain, according to the 2001 Census, there were 14,184,026 dwellings, and the most common floor area was between 76 and 90 m². This floor area relates to 29.3% of all households, which are also distributed with a high frequency in the immediately larger and smaller bands. Dwellings of a size less than 30 m² are less common (0.4% of the total of all households) than those with a size of greater than 180 m². Whatever the number of persons who make up the household may be, the size of 76 to 90 m² net is the most frequent. In terms of the number of rooms, the most frequent case is for a home to have five (38%) and this is the most common number regardless of how many members of the household there may be. Such a preponderance of the standard model in terms of the floor area available and the distribution highlight limited flexibility to satisfy the need for housing in line with the position of the household in their life cycle.

The differences due to socio-economic position are seen clearly in the availability of the second home. According to the 2001 Census, 15.04% of households have a second home, and this reaches a maximum in households in which the reference person is employed by the government (27.95%). Frequently the circumstances of being a city dweller and a high level of employment qualifications also coincide in such people. Unqualified workers in agricultural (7.03%) and non-agrarian (8.30%) activities are those with the minimum availability of a second home. In all socio-economic categories, the availability of a second home is more frequent among non-agrarian workers, which is due both to higher relative earnings and to the commonly expressed desire of city dwellers to gain access to a more natural ecology than that of the cities. Other sources (Household Panel, Socio-Demographic Survey - Panel de Hogares, Encuesta Sociodemográfica) would allow us to increase the percentage of households with a second home in Spain in 2004 to 19.1%³⁵.

³⁵ According to the "CIS Barometer" dated November 2009, 16.9% of households own a second home. Among those who have completed higher education, the ratio is 27.0%.

This is the highest ratio in Europe, followed by Greece (17.9%), Italy, and France. This does not reach 10% in the United Kingdom, Germany, or the Netherlands, where there is no strong long-standing tradition of summer homes or homes on the coast, and nor has there been such an intense recent phenomenon of tourism. Among the owners of multiple homes, married couples of between fifty-five and sixty-four years of age, who are qualified salary earners with children, predominate. A considerable proportion of the number of second homes in Spain (37.5%) corresponds to non-resident households, in the majority European from other countries within the European Union. It can be estimated that these dwellings are used temporarily or permanently by between 1.25 and 3.7 million persons who are not resident in Spain (López Colas, and Módenes Cabrerizo 2004). These figures date from before the major immigration which took place in the second half of the last decade of the previous century, which transformed the patterns of accommodation throughout the entire country.

From the perspective of the work devoted to maintaining the accommodation, the second home increases the required use of time considerably. Part of the maintenance and completion of second homes can be seen in the labour market and the formal economy, but a major part of the paid work is not made visible because it is informal, and in the hidden economy. In turn, the paid work is only a small part of the overall work which the maintenance of the dwellings consumes. Second homes frequently play an important role in maintaining ties in the extended family, and constitute a safety valve for the adult members of the nuclear family who live with their parents.

2.3.3. The means of gaining access to housing

The purchase, rent, inheritance, donation, or loan, and sale by the government, are the most usual means of gaining access to housing, but there do exist other routes, such as occupation or construction by the people living in them, with or without legal title to the space occupied or the materials employed. In some parts of Africa, self-construction is the most frequent means of access, and the women play a full role in this task (Navarro 1998). Ownership is, in general terms, a means of access associated with prosperity, but not always. There are

important cultural and legal differences between countries which turn the preferences of families towards rental or other forms of access to accommodation which do not involve ownership.

In Spain, the inventory of housing tripled between 1950 and 2001. The average floor area of first homes counted in the census in 2001 was 93.3 m², 6.5 m² more than in the census of 1991 (Uriel 2009, 53). Occupied first houses made up 70% of family homes in 2001, while occupied second homes came to 17% (more than three million homes). At that date, 15% of the total number of houses was unoccupied (Uriel 2009, 38). Nevertheless, the available statistics on housing in Spain were compiled to meet a range of different criteria, and the variation in topics and definitions makes them difficult to use (Palacios 2008).

According to the Living Conditions Survey of 2009, 82.1% of first homes were owned by the people living in them. Such a high preference for ownership has been promoted for decades by the Government, because they consider it to be a factor for social stability. The Government contributed to promoting it by the tax treatment and the lack of protection for landlords against their tenants, which completely demotivated the free letting market. Even the inventory of subsidised social housing has in the main become the property of the people living in them, the result of not having an effective management policy. Currently a change in the trend is beginning, triggered by the deep property crisis which has put an end to a long cycle of continued rises in the value of properties. Now it is no longer a safe haven for family investment, and both the market and the Government have made an about turn in their thinking. Until now, the sum of the frequency of property holding by letting below market rate and gratuitous transfer was greater than that of letting at market rates, but letting at market prices is gaining weight as a form of property holding (Table 2.8). From the perspective of non-remunerated maintenance work there is not a great difference between the forms of holding, but it can be expected that a more flexible market will make it possible to adapt the size of houses to the variation in the number of people who make up the household and their needs better.

The proportion of home owners is greater in households where the reference person is of mature age than among young house-

TABLE 2.8: Households by type of title to housing and by type of building
(horizontal and vertical percentages)

	Total (in thousands)	Ownership	Rent at market prices	Rent below market prices	Assignment free of charge	Total %	Total %
Total	16,978.9	82.1	8.5	3.0	6.4	100.0	100.0
Family dwelling	5,739.9	86.1	3.7	1.4	8.9	100.0	33.8
Detached	2,313.3	87.1	3.3	1.0	8.5	100.0	13.6
Semi-detached or terraced	3,426.6	85.4	3.9	1.6	9.1	100.0	20.2
Condominium building	11,207.1	80.2	10.9	3.7	5.1	100.0	66.0
With less than 10 dwellings	3,197.8	71.5	15.8	4.6	8.1	100.0	18.8
With 10 dwellings or more	8,009.3	83.7	9.0	3.4	3.9	100.0	47.2
Not stated	32.0	35.6	25.4	27.4	11.7	100.0	0.2

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2009 (INE 2009).

holds, and in rural areas more than in urban areas. The size and quality of the accommodation is associated with economic capacity, but in the greater picture this association is blurred by indicators which are unable to see these differences.

Surveys on inequality and poverty give a good idea of the economic and social importance of the household; the result is different depending on whether or not latent income (or avoiding necessary expenses) originating in the ownership of the accommodation is taken into account. There is no shortage of criticisms of the distorting effect this element can cause in the indicators of poverty, inequality, or growth (Deaton 2010). In Spain, according to the statistical definition of relative poverty, the poverty risk rate affects almost one fifth of the population when no implied rent is included, but in 2009 this did not increase compared to the years before the crisis (19.7% in 2007; 19.5% in 2009) (INE 2010). It remains higher for women than for men (20.6% *vs.* 18.3%), and is much higher for the older population over 65 years of age (25.7%) than for the population of intermediate age, from 16 to 64 years of age (17.1%).

The group at greatest risk of poverty, that of women over 65 years of age, had a six percentage point greater risk rate than the men (32.6% *vs.* 28.0%), but has reduced the distance and value of the risk (27.4% *vs.* 23.4%). In accordance with internationally agreed criteria, the Spanish National Statistics Office (INE) acknowledges that home ownership is decisive in estimating income and consequently the risk of poverty. When the assumed value of the unpaid rent is applied, the poverty risk rate for the entire population falls by twenty percent (15.5% in 2009), and in the case of the population over the age of 65, who are for the most part owners of the accommodation in which they live, it falls virtually to half (13.7% *vs.* 25.7%), and even to a value of slightly less than half in the case of older women (13.2 *vs.* 27.4%).

Housing is a costly good which feels the effect of financial crises immediately. The percentage of families who are overdue in the payment of expenses related to their first home over the preceding twelve months, which was 5.2% in 2007, grew to 7.2% in 2009, a relative increase of almost 40%.

2.3.4. Provision of infrastructure and technology in the home. Its effect on unpaid domestic work

The effort required to acquire a house in any country is considerable. Two frequently used indicators to measure this are the proportion of the monthly personal income (or that of the household) which is required to pay the rent, or the number of months in which it is necessary to devote the entire monthly earnings (individual or the household) to achieving ownership. Both indicators refer to the payment of the accommodation in the formal economy, but do not take into account the effort which households put into finishing and maintenance of the conditions of habitability of the home, which is normally done through the non-remunerated work of the members of the household themselves. Nor do they take into account the time it is necessary to wait to achieve it when the accommodation is not obtained through the market.

The size and facilities of the home do not have a linear relationship with the time required for maintenance (Pérez 2000). Below a certain level of provision (water, electricity, heating system, access to transport, waste disposal, etc.), the work required for the home to

operate is very high, but falls when these minimum levels are achieved. For example, it has been calculated that 18% of the world population lacks potable water in their homes, and in order to obtain it are required to go to natural sources, pump it up from the sub-soil, or treat it physically and chemically. The lack of potable water not only consumes an enormous amount of non-remunerated work in order to supply homes on a daily basis, but also the lack of quality causes illnesses which similarly absorb care work, not to mention the suffering of the sick individuals and their carers. The liberation from this work does not convert automatically into work included in the market, but into forced idleness (Chakraborty 2005). This is the result of the analysis by Chakraborty for India, where the non-existence of good infrastructure for the supply of water requires a great amount of non-remunerated work, supplied for the most part by women.

The availability of lavatories connected to public sanitation networks with waste water treatment is a somewhat similar case, although this indicator is less expressive because it is impacted by the density of the population and the type of settlement, whether dispersed or concentrated. This indicator includes not only the sewage network, but the pipework to take the waste waters away to sites at a distance from the town centres for treatment in public recycling plants, in order to prevent subsequent pollution of rainwater. In some places, the optimum solution may not be to cover the entire population, but in countries like the United Kingdom 92% of households are covered, and in the Netherlands 98%. It is estimated that only 12% of the world population has access to this type of infrastructure³⁶. In Western Europe, it is estimated that 76% of the population is covered by this service, in Eastern Europe, 29%, in North America 60%, and in Central Africa 1% (Table 2.9).

Above a certain minimum level of size and facilities, the work required for the care of the accommodation begins to increase and absorbs not only the time of one or other of the people who live there, but also people who are paid to be responsible for looking after it. There is no limit to the capacity for growth of accommodation services in households: whether in quantity, or in variety, or in

³⁶ *Worldmapper*, no. 185 (data circa 2002/2002).

TABLE 2.9: Standards of infrastructure in dwellings
(percentage)

	Population in 2008 with				Population in 2010 living in marginal districts
	Drinking water		Sewage network		
	Urban	Rural	Urban	Rural	
World	96	78	76	45	32.7
Developing regions	94	76	68	40	33.0
Oceania	92	37	81	45	24.0
Sub-Saharan Africa	83	47	44	24	62.0
West Asia	96	78	94	67	25.0
Latin America and the Caribbean	97	80	86	55	24.0
South East Asia	92	81	79	60	31.0
East Asia	98	82	61	53	28.0
South Asia	95	83	57	26	35.0
North Africa	95	87	94	83	13.0
CIS*	98	87	93	83	–
Developed regions	100	98	100	96	–

* CIS: Community of Independent States.

Source: Prepared by M.A. Durán using data from the United Nations (UN 2010a).

quality. This is highlighted in the formal economy by services equivalent to that of households in the hotel sector: the market offers a range from the simplest hostels for those who travel with a rucksack to the most luxurious villas with exclusive furnishing, haute cuisine, and uniformed staff. Translated into monetary terms, in the hotel business, accommodation per person per day may range along a scale from one to a hundred in terms of the quality of the service provided. It is the same in the case of households, although the quality of the services which households provide does not have such an immediate relationship with the capital employed.

The basic facilities in the home, those which save working time (running water, electricity, accessibility for transport, district collective services) are available for very widely disparate strata of the population in the developed countries. Also available in the majority of households is a range of domestic equipment which reduces

domestic work. For example, the differences in access to a washing machine (96.1% *vs.* 99.6%) or the telephone (94.3% *vs.* 99.8%) in Spain vary little between the lowest and highest levels of income (Living Conditions Survey - Encuesta de Condiciones de Vida 2008). To distinguish the differences it would be necessary to use more sophisticated indicators, which would take into account the quality or the age of the equipment, and not merely availability. Other important goods, such as the automobile (39.6% *vs.* 96.3%) or the personal computer (26.8% *vs.* 88.7%) are positively associated with the level of income, but this is to a certain extent fallacious, because only 17% in the case of the computer and 22.7% in respect of the automobile state that they do not have one for financial reasons. The majority cite as their reason that they have no use for one, or that they are unable to use one, reasons which in turn are associated with gender and age.

The target proposed by the United Nations is to reduce the percentage of people without sustainable access to potable water and basic sanitary services to half by the year 2015. Four regions (North Africa, Latin America and the Caribbean, East Asia and South-East Asia) have already reached this target, but effort is still required to improve the conditions of housing in the rural areas.

There are also extensive segments of the population in the developing countries where households do not have modern technology and do not have access to energy, sewage, running water, communications, and transport infrastructure. Among the Millennium Development Goals (MDG) are included improvements in the household water and sewage infrastructure, particularly in marginal districts, because of the repercussion they have on other MDGs (UN 2010b). From data taken from 45 developing countries, in households where there is no running water, the task of providing it falls basically on the women (24% of men participate, 64% of women, 8% of girls, and 4% of boys). It is a task which requires a considerable amount of time, because several journeys are required to satisfy the minimum daily requirements (UNDP 2010).

3. The opaque nature of non-remunerated work and households in the systems of national accounts

3.1. Who cares about GDP?

3.1.1. The *hype*³⁷ of GDP and the mirage of growth

The European Commission (EC) has proposed that the European System of National and Regional Accounts (ESA95) should be revised, especially with regard to methodology and the programme for the transfer of data. It is expected that this will be regulated by the European Parliament and the Council in 2012, and that it will be implemented in 2014³⁸.

Market growth does not always mean real growth, and conversely, a contraction in the market does not always mean a decrease in the goods and services to which the inhabitants of a country or of a region actually have access. The production value comes from the amount of goods and services produced and the price that is assigned to them. A major part of the growth in GDP in developed countries over the last few decades has been due to the transfer of services previously produced in the home to the market. When productivity in the market is higher than that of households, growth is real, but when it is not, the growth is fictitious, because it is a mere change in the location of the resources. An increase in the quantity produced does not usually give rise to a loss in quality. However the

³⁷ *Hype* is a frequently mentioned theme. The idea of GDP as hype was convincingly expressed by the Director of the European Central Bank, Steve Keuning, in Brussels, September 2009, during the Eurostat National Accounts Conference.

³⁸ Announced by the Director of Eurostat, Walter Radermacher, on 2 September 2009 (Eurostat National Accounts Conference, Brussels, 16 September 2009).

universal extension of personal services usually does result in a reduction in quality making it difficult to value the resulting production. The rate of change and the market price affect the value of what is produced as much as changes in the quantity and quality of production. Accordingly, indicators which eliminate the effect of some of these changes on the estimates of the real economic growth are indispensable (deflation indices and others). Furthermore, in order to achieve the GDP growth targets that many countries set themselves, the easiest and sometimes the only way to do this is to incorporate into the market a portion of the potential female labour force which was formerly involved in unpaid work in their homes.

That, from its origins, this macroeconomic framework has had a number of weaknesses in contrast with its many strengths, has escaped none of the persons responsible for the national accounts. And similarly, the persons responsible for the national accounts are aware that the accounts are a tool, not a commodity in themselves. Moreover, their effectiveness depends upon them being accepted by those who use them and that they do not generate intellectual or social irritation. Nevertheless, the lack of controversy over or rejection of the national accounts should not be interpreted as acquiescence or conviction. It is rather that social movements are currently incapable of offering a conceptual alternative, and above all, their lack of confidence in those institutions which would have to accept the change. Various different social movements are voicing complaints and proposing alternatives both to specific accounting methodologies and to the view of the economic world which underlies the System of National Accounts (SNA).

The vision offered by the national accounts of the economy is, as its name indicates, territorial/national. In view of the unceasing process of internationalisation and globalisation, it is becoming increasingly difficult to restrict economic analysis to the limits of any one national territory, however indispensable this view may be for those who are taking decisions or representing interests at that level (Stokrom, Bongor, and Nootenboom, et al. 2007). All large companies whose property, investments, production centres, and client base are distributed across different continents are, by that very fact, international. Their share price is decided in international financial markets, and their employees come from, and live in, different

countries. Technology also flows from one place to another, and in doing so transforms models of social organisation (Fontanier 2007).

One of the principal problems for accountants posed by internationalisation is the standardisation of the classification of goods and business activities. The wider the spectrum of situations being compared, the less similarity there is in the content of each activity, and the greater the risk that such comparisons will be meaningless. Furthermore, adjusting or modifying categories generates methodological problems and transition periods during which uncertainty as to the meaning of the data increases (Lynch 2007). This is the reason for the enormous effort devoted by accountants to the standardisation of categories and classifications, not only of sectors of production, economic activities, and types of goods, but also of occupations and professions. In general, classifications are known by their symbols, and in consequence they are incomprehensible to the layman³⁹. “Reference classifications” are agreed by means of international treaties and approved by the Statistical Commission of the United Nations or other inter-governmental committees. In order to adapt them to a more local use, so-called “derived classifications” are devised. These are comparable to those preceding them at a higher, more aggregated level: for example, NACE is the derivation of the ISIC within the ambit of the European Union. “Related classifications” are those which are partially adapted to the reference classifications, and correspondence tables are required to perform comparisons, although such comparison may not be complete (Dimove 2007).

As in business and industrial activities, the same problems are posed for the classification of occupations via the use of time surveys such as ICATUS, CAUTAL (Gómez Luna 2010) and others, with the difference that the degree of standardisation and consensus is for the moment very much reduced. They have not been subject to successive agreements since 1948, neither do they have the backing of

³⁹ The first International Standard Industrial Classification of All Economic Activities (ISIC) was adopted in 1948 and the fourth revision was made in 2006. Other classifications used are NACE (industrial activities in Europe), NAICS (used in North America), and ANZSIC (in Australia and New Zealand).

major statistical committees, and nor do they have the support of the accumulated work of several generations of statisticians and analysts. On the plus side, they still have their own weakness, which enables them to be flexible and innovative. This together with the impulse provided by the social movements drives them on. However this is not equal to the force of the users of the classifications already established for the market economy.

Eurostat has proposed a legal change, to be introduced step by step, through satellite accounts which can include different types of profiles and make allowances for difference purposes and users. At the same time it emphasises that the principal strength of the SNA lies in its quality, and that this impedes the taking of innovative steps. Each attempt to produce new statistics, and what's more, to include them in macro-economic models, is by definition of poorer quality than a system which absorbs all of the available resources and which has an agreed means of collecting, processing, interpreting, analysing, and distributing data with the immense majority of technicians and institutions. Eurostat acknowledges that the current accounting system has to confront three challenges:

- a) Changes towards a technologically advanced society in which the most competitive aspect will be knowledge and not products.
- b) A demographic change which is giving rise to proportional growth in the elderly population and the consequent increase in the economic importance of pensions systems.
- c) The awareness that natural resources are not inexhaustible.

As with any other institution, the European Statistical Office faces a dilemma when it recognises weak points in its activity, but nevertheless does not take radical measures to resolve them. They make the assumption that “not all of the important features of reality are measurable” (Radermacher 2009) and that, in the event that they might be measured, “not all measurements can be taken with the quality required by official statistics”. It is a vicious circle, because quality is ascribed to the procedure and not to the “vision” or starting point of the research. It will be difficult to achieve a competitive level of quality in research on important topics, which have to date

been insufficiently observed, if their importance is not recognised in advance and if the indispensable resources are not assigned to carry the research studies forward in a systematic manner in a different direction.

The position adopted by the European Central Bank (ECB) is similar. On the one hand, it acknowledges that GDP “only provides a partial indicator of welfare, and changes in volume cannot be equated with changes in welfare” (Keuning 2009), and on the other, GDP is praised as the most comprehensive indicator of added value of product in each country.

However GDP is often praised for the intensive use that is made of it by political decision makers, questions have to be asked about what damage is being caused by the failure to incorporate economic realities other than those observed by the SNA, and how this data can be remedied. The truth is that GDP is being used excessively, and in many cases uncritically, like an icon or a mantra. Or, in the words of the Director of the European Central Bank himself, as *hype*, something which people believe is essential to use.

There are several reasons for the resistance to changing the concept or the use made of GDP. Change would be costly, habit generates inertia, modifications would destroy the comparative value of the series, and current GDP is supported by delicate international equilibrium and conventions. But the principal resistance to change stems from fear of generating conflict between those who would be prejudiced by and those who would benefit if new topics or procedures were included, a point which eludes the very statistical institutions or banks responsible for drawing up the national accounts in the great majority of countries. Any small conceptual or procedural change brings with it a reduction or an increase in GDP and is immediately processed by the economic monitoring organisations and disseminated throughout the world by the media, which in turn are absorbed by the banks’ automatic programming systems. Strupczewski (2009) has shrewdly recounted the way in which a small news item on the increase in German and French GDP immediately affected the price of the Dollar, the Euro, and the Yen, in addition to the price of a barrel of oil. Any of these movements translate into gains and losses of thousands of millions of Euros for different parties, which may not simply have

an impact on financial markets, but can also cause a government to fall from grace⁴⁰.

From what is not a strictly economic standpoint, the progress indicator which is most widely used internationally is the *Human Development Index*. The HDI (Human Development Index) was published for the first time in 1990⁴¹. It is an indicator composed of three parameters: health and life expectancy, education, and standard of living. In 2006 (published in 2008), Spain occupied the 16th place on the index and obtained a score of “very high”. When growth in GDP is compared with this and other indicators, it turns out that National Accounting does not always fulfil its role as a mirror. At times, rather than a mirror, it turns out to be a mirage.

3.1.2. Development and structure of GDP.

An international view

From the point of view of the SNA non-remunerated work barely exists. Nevertheless, the place in which it occurs most frequently, households, does attract the attention of the Accounts. Although it only does so from the monetary aspects of economic life and principally from the perspective of cash flows, at least it facilitates the task of locating non-remunerated work in a context which, in turn, is located systematically and regularly in the global area of what is conventionally known as the economy. It is for this reason that a panorama is given below, in outline, of the distribution of the principal economic magnitudes in the world. The estimates suffer from major variations depending on the sources employed. In view of the high degree of generally accepted accounting principles, the differences on a global scale are due both to the lack of available statistics and to the manner in which these are processed.

The first thing that stands out in Table 3.1 is the enormous difference between the economic value of what is produced in each region or country after being divided by the number of inhabitants. Annual per capita GDP in Africa is currently USD 1,676, while that

⁴⁰ Although not as the result of GDP data, Spain suffered direct unwelcome effects related to this matter during the second week of February 2010.

⁴¹ The on-line version of the twentieth human development report was presented on November 4th 2010.

**TABLE 3.1: Gross Domestic Product per capita in the major regions
circa 2009**
(Current US Dollars)

Major regions		Some sub-regions and countries	
World	9,178	Luxembourg	105,095
Africa	1,676	Arab Emirates	39,625
America	22,647	Finland	44,502
Asia	4,775	United States	46,546
Europe	25,678	Australia and New Zealand	53,061
Oceania	39,850	Canada	46,361
Western Europe	42,198	Germany	39,857
		Japan	43,141
		Spain	30,543
		Russian Federation	10,351
		Venezuela	13,503
		Chile	11,888
		Mexico	9,101
		Uruguay	11,952
		Latin America and the Caribbean	8,672
		Cuba	5,704
		Dominican Republic	5,195
		Ecuador	4,073
		Republic of China	4,354
		Bolivia	1,978
		India	1,406
		Pakistan	1,003
		Haiti	613
		Bangladesh	670
		Eritrea	429

Source: Prepared by M.A. Durán using data from the United Nations, “National Accounts Main Aggregates Database”; data referring to 2009, updated in December 2011.

of Western Europe is USD 42,198, twenty-five times greater. Some countries, such as Luxembourg (GDP in current USD 105,095 per capita) are, in terms of this indicator, 245 times richer than other countries, such as Eritrea (current GDP of USD 429 per capita).

These differences are overwhelming, and would be even greater if they were weighted in accordance with the internal inequalities within each of these countries. Nevertheless, not all of the wealth produced in any country filters down to the citizens and residents within their borders (tax havens, etc.), and nor do all of the inhabitants of any country or region have access only to the type of wealth measured by the SNA.

Even confining oneself to the conventional limits of the economy as measured by GDP, economic structural differences mean that the Tables have a different meaning for those who are grouped together by each national account. Tables 3.2 and 3.3 show the differences in the structure of some of the most developed regions in the world, based upon estimates from the UNECE: Europe (EU-27 and the Eurozone-16), North America-2 (United States and Canada), and the Russian Federation.

In spite of their disparities, these regions are very similar to each other when they are placed in the context of the worldwide economy. They use similar technologies, they have developed infrastructures, and there is a strong economy outside households in all of them. The Government and the Public Administration as a whole spend a broadly similar proportion of GDP in final consumption: 19.6% in North America, 25.6% in the Russian Federation, and 26.2% in the European Union.

The differences between these three regions are of volume and structure. The GDP per capita is three times higher in North America-2 (USA and Canada) than in the Russian Federation, and there are a number of significant differences between the three regions in the proportion of what is produced and subsequently spent within the borders of each of the areas; in North America 95.4% and in the Russian Federation 89.4%, namely six percentage points. In respect to the year of reference, the margin of variation in the part of GDP devoted to gross capital formation was seven percentage points, with the maximum in the Russian Federation, the minimum in North America and with Europe in an intermediate position.

Final consumption is divided between households and the Government. It will be increasingly difficult to distinguish the concepts of total interior consumption, that of households from that of the Government, because as globalisation advances, the location of

TABLE 3.2: **The distribution of GDP**
(in millions of euros)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	GDP (c/p in \$)			Total internal expenditure (c/p)		Final consumption expenditure (c/p)		Final consumption expenditure - households and NPO (c/p)		Final consumption expenditure - Government (c/p)		Gross capital formation			
	In current prices and PPP*	In current prices and PPP*	% A/B	In current prices and PPP	% D/GDP	In current prices and PPP	% F / GDP	In current prices and PPP	% M over GDP	% W / final consumption	In current prices and PPP	% K / GDP	% K / final consumption	In current prices and PPP	% K / GDP
North America-2	46,597	42,963	108	44,457	95.4	39,949	85,7	32,129	69.0	80.4	7,820	16.8	19.6	8,685	18.6
European Union-27	30,708	28,534	108	28,486	92.8	24,054	78,3	17,733	57.7	73.7	6,321	20.6	26.2	6,709	21.8
Eurozone-16	33,277	30,868	108	30,370	91.3	25,622	77,0	18,854	56.7	73.6	6,768	20.3	26.4	7,379	22.2
Russian Federation	15,946	14,699	108	14,249	89.4	10,423	65,4	7,754	48.6	74.3	2,670	16.7	25.6	4,073	25.5

PPP, purchasing power parity.

Source: Prepared by M.A. Durán using data from UNECE (2008), referring to 2008. Current prices and PPP refer to 2008. For fixed figures 2005 was taken as the base.

TABLE 3.3: 2008 Growth indices for Europe, North America, and the Russian Federation
(2005 =100, at 2005 prices and PPP)

	GDP p/c	Total interior expenditure c/p	Final consumption total expenditure c/p	Final consumption expenditure - households and IFSL c/p	Final consumption expenditure - Government c/p	Gross capital formation c/p	Gross fixed capital formation c/p
North America-2	102.4	101.0	102.8	102.8	102.9	93.2	96
European Union-27	106.3	106.4	104.8	104.6	105.2	112.6	–
Eurozone-16	104.9	104.5	103.2	102.5	104.9	109.3	108.3
Russian Federation	123.9	139.2	132.7	141.6	109.4	160.6	158.5

PPP: purchasing power parity

Source: Prepared by M.A. Durán using data from UNECE (2008).

production, consumption, intervention and administration shift. The flow of capital and people makes it difficult to assign a specific place to the phenomena reflected in the national accounts. Where are the products of multinational companies produced? Where do migrant workers produce their goods? What macroeconomic role is played by governments in transfers and capital movements? How can the environmental costs and benefits be incorporated into the concept of fixed capital?

The expenditure on final consumption, that part which finally is not applied to the production of more goods, is much higher in North America than in the Russian Federation (columns F & G). In percentage terms there is a difference of twenty points; when expressed as a proportion, the proportion of final consumption in the GDP is 31 % higher in North America (85.7%) than in the Russian Federation (65.4%).

Interpreting the role played by households in these three major regions is not easy because in each region there is a different proportion of economic entities that are orientated towards the market which are not classified as companies (small operations and businesses, the self-employed, etc.) because they are not incorporated as companies and for accounting purposes they are grouped together with households. This methodological decision makes com-

parison with estimates based upon other sources very difficult; for example, the Family Budget Survey and other censuses or surveys only understand the term household to mean the group of persons who share a dwelling.

By statistical agreement, the macroeconomic participation of households is presented in conjunction with that of non-profit making organisations which produce services for themselves. As the economic role of the latter is very small in comparison with that of households, it is frequently simplified and in the analysis only the former are mentioned. This is a simplification which is acceptable overall, but non-profit making organisations (NPO) play an important role in certain specific social sectors, regions, and periods.

The colossal task of managing and administering the greater part of GDP and of final consumption falls on households. In North America, households administer 69% of GDP and 80.4% of final consumption. In the Russian Federation, the proportion of final consumption against overall production is lower than in the other regions quoted, as has already been indicated, and consequently the all-absorbing task of administration and management does not fall on households: for better or for worse, they are only responsible for administering 48.6% of GDP and 74.3% of final consumption.

An idea of the economic importance of this consumption function is be provided by a comparison of the number of public employees occupied in the management of the resources which governments administer, leaving aside those who are employed to offer services directly; if the administration of resources is handled by households, it does not form a part of GDP and is therefore not reflected in the SNA. However, if it transferred to the Public Administration or to companies, it would be reflected.

Final consumption by households is the economic magnitude that best articulates the connection between the market economy, the State, and the economy based upon non-remunerated work. State and market resources flow in (and out) of households, to which non-remunerated work to provide services to household members must be added. From a non-household economic standpoint, household consumption is always considered to be final consumption, but a large portion of these resources are transformed once again in each household to give them greater added value. A

classic example is the process of the transformation of foodstuffs, which is capable of converting cheap and barely processed materials into culinary services of the highest quality. If these were to be consumed in restaurants, the price would increase by so much that they would be beyond the means of the majority of the population.

Table 3.4 reflects the change in GDP per capita in the major regions between 1970 and 2008 in current Dollars. This has been multiplied by a factor of ten worldwide, a formidable proportion even when adjusted for inflation. The region of maximum growth according to this indicator is Asia, and the region with minimum growth is Europe. Oceania and Latin America are above the world-wide average.

It must be asked what its role has been played in these transformations and in that of GDP growth by non-remunerated work. To what extent is growth due to the increase in productivity based on technology and organisational improvements, or is it largely a question of changes in the demographic structure over the short-term, and which will change direction over the medium-term? Or is it

TABLE 3.4: GDP per capita
(current US Dollars)

	1970	1990	2008	Percentage 2008/1970
World	892	4,208	9,012	1,010
America	2,509	10,456	21,759	867
Latin America	649	2,787	7,671	1,181
North America	4,806	22,438	45,232	941
Africa	235	785	1,545	657
Asia	239	1,699	4,106	1,717
Europe	1,929	11,665	29,150	1,511
Oceania	2,620	13,676	33,877	1,293

According to the United Nations classification, America includes North America, the Caribbean, Central America and South America. Latin America includes the Caribbean. North America includes Bermuda, Canada, Greenland, and the United States. Africa includes East Africa, Central Africa, North Africa, West Africa and Southern Africa. Asia includes Central Asia, East Asia, South East Asia, South Asia, and West Asia. Europe includes Eastern Europe, Northern Europe, Southern Europe, and Western Europe.

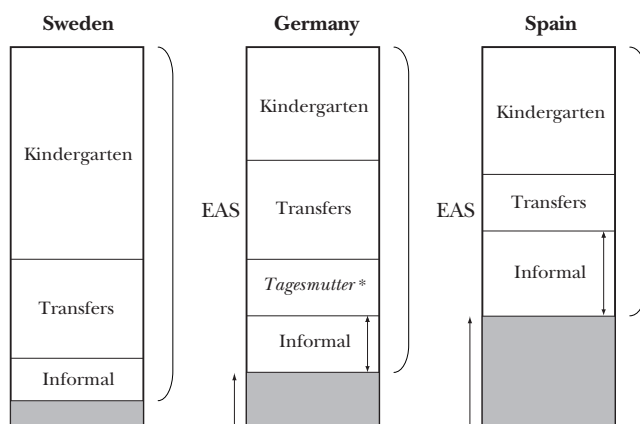
Source: Prepared by M.A. Durán using data from UNECE (2008).

merely due to transfers of resources from economic activities which are invisible to the SNA to activities which are accounted for by GDP? Back in 1995, estimates by the United Nations already put global production not accounted for by national accounting at “16 *trillion* Dollars” (in the US meaning of the word), of which eleven trillion were related to the invisible non-monetary work undertaken by women (UNDP 1995)⁴². The total amount of work invested in activities included in the SNA in the industrialised countries is somewhat less than one half of the Table for total working time, and the rest relates to work outside the remit of the SNA (UNDP 1995, 5). Although international comparison is risky due to the differences in sources and methodology, in 1995 it was calculated that men’s share in the time invested in SNA accounted activities ranged between different countries from 61% (Canada) to 81% (the Netherlands). However, their share in work time invested in non-SNA activities varied between 21% (Denmark) and 48% (the Netherlands) (Chakraborty 2005, 5-6). In non-industrialised countries for which we have information, the men’s share in work not covered in the SNA was close to 14% (13% in Venezuela, urban areas, and 14% in Indonesia, urban areas).

The manner in which remunerated work and non-remunerated work interact should be a decisive matter for decision makers in public policy, however they frequently overlook it or forget about it. This is particularly important for developing countries with a high infant population requiring care, but it is also important if we are to understand the society and economy of developed countries. As has been demonstrated by García-Díez, in three countries which are as close as Sweden, Germany, and Spain, childcare is reflected in very different ways in the accounting system, and consequently in GDP, although this does not guarantee that the quality of care is better in any one country. Sweden offers extensive public childcare services (Graph 3.1), direct cash payments to households with children. There is very little recourse to informal carers and relatives within the extended family, and therefore the activity of childcare is widely covered in the Economic Accounting System (EAS). In

⁴² A trillion, in US usage, is equivalent to 1,000,000,000,000; or, to express this in another manner, 10¹² (Chakraborty 2005, 3).

GRAPH 3.1: Childcare activity for children from 0 to 3 years old in the economic and accounting system of Sweden, Germany, and Spain



* *Tagesmutter*, literally a “day mother” in German, is a professional nanny linked to the public services who looks after a number of children in her own home

Source: García-Díez (2010).

Spain there are fewer services on offer, and the same is true of cash payments; on the other hand the use of informal paid carers who are included in the EAC is common and above all, help is provided by grandparents and other relatives whose care is not included in the EAC (García-Díez 2010). Germany occupies an intermediate position.

The lack of attention paid to the crucial role of non-remunerated work in developing countries is particularly serious in the case of some international programmes which in fact specifically seek social objectives. If development targets are set in terms of GDP, there is pressure for resources which were formerly devoted to non-remunerated household work to be transferred over to the market economy in order to generate income, above all in sectors which make it possible to export goods in order to obtain foreign currency. No objection can be made against the transfer of resources from households to the market, but it must not be forgotten that this is frequently accompanied by the abandonment of production for self-consumption which had formerly permitted the survival of de-

pendent family household members. When the work formerly produced within the households is transferred to the market economy, there is only a real improvement if the productivity of the task to which it is applied is higher than that which was obtained previously; if this is not the case, either the tasks previously carried out cease to be performed because the market does not offer substitutes at a low price, or the tasks are bundled into a double working day for household members. This criticism may be levelled at one of the United Nations most ambitious programmes, known as “Millennium Development Goals”, if the indicators of wealth and poverty with which the progress of each country is measured are used uncritically (Elson 2005).

3.1.3. The Stiglitz-Sen-Fitoussi Report

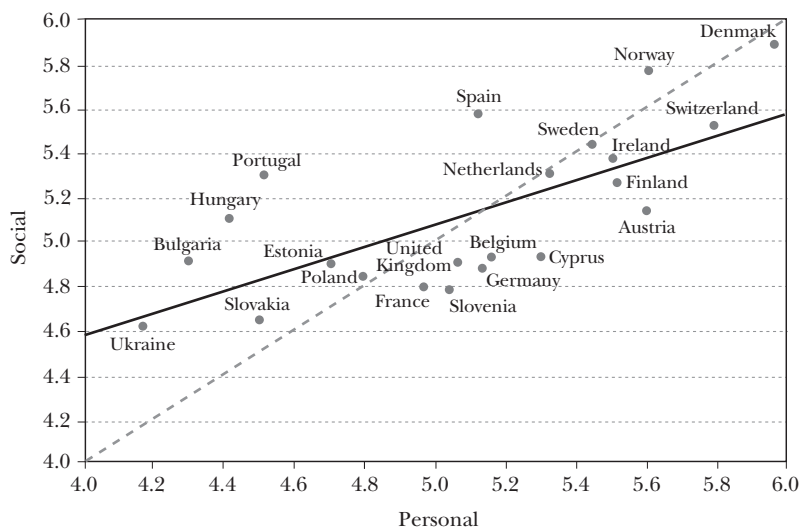
Together with the criticisms of GDP in respect of its limitations in reflecting material production, complaints are raised in respect to the fact that it omits other aspects which are more important than wealth, including the complaints of those who defend what are known as the *National Welfare Accounts*. In 2007 the “Measuring the Progress of Societies” international conference was held in Istanbul, hosted by the OECD. This conference was called to propose new and more inclusive measurements of progress which could serve as the basis for public policies, and Eurostat commenced a search for a common welfare indicator for the European Union⁴³. In 2008, the Commission on the Measurement of Economic Performance and Social Progress was formed at the behest of the French Government; it was chaired by J. Stiglitz, and among its members were A. Sen and other recognised experts from various countries. In their first Report in 2009, the gap between the Tables at the disposal of the official statistics on production and the perception of the general public of real production was acknowledged. In the United Kingdom and France, only one third of people trusted the official statistics, which has an impact upon the reception given to the public

⁴³ In his opening speech at the “Beyond GDP” Congress the President of the European Commission, José Manuel Barroso, expressly asked for a new indicator to adapt that of GDP or to supplement it with new indicators which would be better focussed on current needs (Brussels, 19 November 2007).

debate on the social and financial measures which have to be adopted (Stiglitz-Sen-Fitoussi 2009). The Report analyses the areas which are currently poorly measured by GDP; inter alia, the quality of the goods and services as opposed to their quantity, and the goods produced for collective use by the Public Administration, which are measured by the inputs expended instead of the outputs produced. But, above all, the Commission's report highlights the need to direct research towards welfare instead of towards production. It proposes a complex system of indicators to give preference to the dimensions of the distribution of income and wealth, and also to consumption. The report explicitly recommends that the measurement of activities at the margin of the market should be included, by means of household satellite accounts (Stiglitz-Sen-Fitoussi 2009) so as to incorporate the change in the patterns of the use of time in order to avoid creating a false image of prosperity by merely displacing activities from the household sector to the market.

The intended recipients of the report are political leaders, those who take political decisions and execute them, academics, statisticians, the users of statistics, and social organisations, as well as the general public. The objective of this report, which has had a significant impact throughout the world, is to open up a debate at an academic level in order to generate innovative research and, in parallel, to involve decision makers in reflecting about what the objectives of social progress should be, and what the best way to measure them is.

Among the welfare indicators, satisfaction indicators may be found, both in respect to personal life and with regard to social life. Graph 3.2 refers to the 2009 Report by the NEF (New Economics Foundation) "*National Accounts of Well-being*", in which a ranking of twenty-two European countries was drawn up on the basis of the data from the European Social Survey. This turns out to be quite different from the positions which they would hold on the basis of their respective GDPs. The correlation between the indicators of individual welfare and those of social welfare (support relationships, sense of confidence) (NEF 2009, 21-25) is only moderate. Denmark holds the top position, and the Ukraine the bottom position. Spain achieves better scores for social welfare than in personal welfare, and occupies a medium to high place overall.

GRAPH 3.2: **Personal and social welfare in the European countries**

It has also been highlighted that happiness indicators are much better than indicators of production, equality, or income in the case of Latin America (Graham 2010).

3.1.4. An illustration: non-remunerated work and households in the Spanish National Accounts

Within the highly complex SNA, households are located in what are known as the *institutional sector accounts*, together with the remaining economic sectors: non-financial societies, financial institutions, Public Administration, and household serving non-profit-making institutions (NPISH).

Table 3.5 shows in detail the view of households offered by the Spanish National Accounts (INE 2010a). In order to make this easier to understand, all remaining sectors have been omitted while the information on the economy as a whole has been retained, with a column added to show the proportion represented by households in the overall national economy. The information is arranged around a central axis which indicates the headings; resources (inputs) are shown to the right, and outputs (in which the resources are employed) appear to the left. This macro table of National Ac-

TABLE 3.5 (contd.): **Households in the National Accounts of Spain, 2009**
(in millions of euros)

Employees				Operations and other flows and account balances			
A	B	Percentage B / A		Percentage B / A	B	A	
Total of the economy	Households				Households	Total of the economy	
94,488	4,943	5.2	Taxes on production and on imports				
81,465			Taxes on products				
43,396			Value added type taxes (VAT)				
1,451			Taxes and duties on imports, not including VAT				
36,618			Taxes on products not including VAT and taxes on imports				
13,023	4,943	38.0	Other taxes on production				
-18,084	-5,554	30.7	Subsidies				
-7,250			Subsidies on products				
0			Subsidies on imports				
-7,250			Other subsidies on products				
-10,834	-5,554	51.3	Other subsidies on production				
284,991	42,871	15.0	Gross operating surplus				
175,720	175,720	100.0	Gross mixed income				
127,061	12,391	9.8	Net operating surplus				
155,624	155,624	100.0	Net mixed income				

TABLE 3.5 (contd.): **Households in the National Accounts of Spain, 2009**
(in millions of euros)

Employees	Operations and other flows and account balances			
	A Total of the economy	B Households	Percentage B / A	A Total of the economy
II. 1.2 Assignment account for primary income				
	Gross operating surplus	42,871	15.0	284,991
	Gross mixed income	175,720	100.0	175,720
	<i>Net operating surplus</i>	12,391	9.8	127,061
	<i>Net mixed income</i>	155,624	100.0	155,624
	Remuneration of wage earners	516,673	100.0	516,673
	Wages and salaries	403,197	100.0	403,197
	Employers' social contributions	113,476	100.0	113,476
	Effective social contributions	93,316	100.0	93,316
	Social contributions charged	20,160	100.0	20,160
	Other taxes on production and imports	0	0.0	91,545
	Taxes on products	0	0.0	78,522
	Other taxes on production	0	0.0	13,023
	Subsidies	0	0.0	-11,937
	Subsidies on products	0	0.0	-5,707
	Other subsidies on production	0	0.0	-6,230

TABLE 3.5 (contd.): **Households in the National Accounts of Spain, 2009**
(in millions of euros)

Employees	Operations and other flows and account balances				
A Total of the economy	B Households	Percentage B / A	Percentage B / A	B Households	A Total of the economy
254,154	15,477	6.1		59,897	226,703
177,547	14,644	8.2		26,005	149,330
64,306	0	0.0		22,944	64,564
535	0	0.0		0	1,038
10,625	0	0.0		10,104	10,630
1,141	833	73.0		844	1,141
1,029,541	779,684	75.7			
851,515	729,108	85.6			
II. 2 Secondary income distribution account					

TABLE 3.5 (contd.): **Households in the National Accounts of Spain, 2009**

(in millions of euros)

Employees		Operations and other flows and account balances			
A	B	Percentage B / A	Percentage B / A	Percentage B / A	Percentage B / A
Total of the economy	Households			Households	Total of the economy
157,010	157,010	100.0		378	157,407
136,850	136,850	100.0		0	137,247
20,160	20,160	100.0		378	20,160
168,281	378	0.2		168,328	168,328
133,178	0	0.0		133,225	133,225
5,050	0	0.0			
21,220	378	1.8		5,050	5,050
8,833	0	0.0		21,220	21,220
227,686	49,222	21.6		8,833	8,833
22,259	15,164	68.1		50,578	215,824
22,403	0	0.0		0	22,403
117,735	0	0.0		17,003	22,496
2,892	0	0.0		0	117,735
62,397	34,058	54.6		0	1,618
1,018,569	716,179	70.3		33,575	51,572
840,543	665,603	79.2			

TABLE 3.5 (*contd.*):
Households in the National Accounts of Spain, 2009
(in millions of euros)

Employees	Operations and other flows and account balances					
A Total of the economy	B Households	Percentage B / A	B Households	A Total of the economy		
II. 3 Income redistribution account in kind						
			Gross disposable income	70.3	716,179	1,018,569
			Net disposable income	79.2	665,603	840,543
142,070	0	0.0	Social transfers in kind	100.0	142,070	142,070
93,125	0	0.0	Social benefits in kind	100.0	93,215	93,125
82	0		Reimbursements of benefits from Social Security	100.0	82	82
1,603	0		Other social security benefits in kind	100.0	1,603	1,603
91,440	0	0.0	Welfare benefits in kind	100.0	91,440	91,440
48,945	0	0.0	Transfers of individual non-market goods and services	100.0	48,945	48,945
1,018,569	858,249	84.3	Gross adjusted disposable income			
840,543	807,673	96.1	Net adjusted disposable income			
II. 4.1 Disposable income utilisation account						
			Gross disposable income	70.3	716,179	1,018,569
			Net disposable income	79.2	665,603	840,543

TABLE 3.5 (contd.): **Households in the National Accounts of Spain, 2009**
(in millions of euros)

Employees			Operations and other flows and account balances		
A Total of the economy	B Households	Percentage B / A	Percentage B / A	B Households	A Total of the economy
819,206	586,554	73.5			
728,624	586,554	82.2			
90,582	0	0.0			
1,497	0	0.0			
199,363	131,120	65.8		1,497	1,497
21,337	80,546	377.5			
II. 4.2 Adjusted disposable income utilisation account					
	</				

TABLE 3.5 (*contd.*): **Households in the National Accounts of Spain, 2009**
(in millions of euros)

Employees			Operations and other flows and account balances			
A	B	Percentage	B / A	B	Percentage	A
Total of the economy	Households	B / A		Households	B / A	Total of the economy
Accumulation Accounts						
III. 1.1 Account for changes in net wealth due to saving and to capital transfers						
Net saving						
				</		

TABLE 3.5 (*contd.*):
Households in the National Accounts of Spain, 2009
(in millions of euros)

Employees	Operations and other flows and account balances			
A Total of the economy	B Households	Percentage B / A	B Households	A Total of the economy
III. 1.2 Non-financial asset acquisition account				
<i>Changes in net equity due to saving and capital transfers</i>				
257,370	67,118	26.1	Gross capital formation	25,816
252,961	66,484	26.3	Fixed gross capital formation	
-178,026	-50,576	28.4	Fixed capital consumption	
4,409	634	14.4	Change in stocks and acquisitions less disposals of valuables	
450	-1,794		Acquisitions less disposals of non-financial assets not produced	
-53,978	70,023		Capacity(+)/Need(-) for financing	

Source: Prepared by M.A. Durán using data from the National Accounts of Spain, 2009, published in 2010.

counting is an indispensable starting point for the preparation of non-remunerated work satellite accounts.

According to the *production account*, households produced Euros € 435,703 million. This is the value of goods and services produced by households for the market (€ 354,927 million), together with a small fraction of goods which are consumed by the principally agricultural households themselves. This forms a not inconsiderable part of the Spanish economy (22.5%), because there is a sizeable proportion of self-employed workers and professionals who are not established as companies who for the purposes of the National Accounting are included along with households. Self-consumption absorbs 18% of the production of this institutional sector. Households that consume their own services are not included in this classification of production. Between 2008 and 2009, the overall production of the economy fell by 8%, and that of households dropped by 20%, which was reflected in the decline in their participation in the overall economy. Nevertheless, production for self-consumption increased.

Intermediate consumption of households was € 168,450 million. This includes goods and services consumed in production, as discussed above. The consumption of fixed capital is an estimate of the loss in value of the capital goods and tools employed in production (€ 50,576 million). The net domestic product, or net added value, is found by subtracting intermediate consumption and fixed capital consumption from production.

The *operating account* explains what households employed their resources on in their capacity as producers. When it is labelled as employment, employee remuneration refers to the remuneration paid by households for the production discussed above. Social contributions make up 20.1% of payments under the heading of remuneration to household employees. Taxes and subsidies almost balance each other out in the production under consideration.

Gross and net mixed income is the net domestic product less wages and salaries, after tax, plus subsidies received for production, as discussed above.

The *primary income assignment account* makes it possible to see the composition of household incomes. The incomes of wage earners are assigned as household resources. They total € 516,673 million,

a very high Table both for the households and for the economy as a whole. Of the total remuneration, 22% does not in fact reach the households but is collected as social contributions paid by employees. The households receive income in the form of a yield on their properties (rent, interest, dividends, etc.), and pay to make use of properties which belong to others. This is a major resource for households (€ 59,897 million, 10% less than the preceding year) although it is not comparable with wages and salaries. In 2008, households paid almost one half of what they received under this heading. The share of households in gross domestic product was 75.7% and 85.6% of the net domestic product.

The *secondary distribution account* makes it possible to take one step ahead in the understanding of the distribution of income, determining the taxes, as well as contributions which the members of the households and the households pay (Personal Income Tax (PIT), and wealth tax). The value of the taxes (€ 76,179 million) is equivalent to 10.4% of net domestic product, and the value of the social contributions (€ 157,010 million), is equivalent to 21.53% of net domestic product. Together, the two items amount to 32% of net domestic product. In other words, one third of the monetary resources of households are returned to the Government for redistribution.

Social benefits other than social transfers in kind are a resource which households receive, composed principally of cash benefits from the Social Security (€ 133,225 million), from social welfare (€ 8,833 million), and from employers (€ 21,220 million). With respect to 2008, the three lines increased by more than 10%, with that of the Social Security registering an increase of 15%.

In other transfers, the sum of those which comprise household resources, such as compensation and miscellaneous transfers (€ 50,578 million), is similar to those which constitute the use of resources (€ 49,222 million). Both lines fell by close to 7% with respect to the preceding year. Gross and net disposable income is obtained after these operations. Net disposable income is the result of subtracting taxes and social contributions from gross income, adding transfers other than those in kind, and the balance of transfers. In 2009, it was € 840,543 million for the economy as a whole, and € 665,603 million for households, a proportion of 79.2%.

Social transfers in kind are non-cash resources received by house-

holds, principally from the Social Security and from social welfare. In 2009, these amounted to € 142,070 million, some 8% more than the year before. If transfers in kind are added to the net disposable income, the result is the net adjusted disposable household income (€ 858,249 million). In 2009, it was 9% higher than in 2008. This item is of particular importance in understanding the structure of real household consumption, which is distorted if only the expenses paid directly by households are taken into account, for example those measured by the family budget surveys, or the living conditions surveys.

Disposable income is employed in spending and saving. The expense on final consumption is that made by households on themselves, and does not therefore include the expenses paid for them by the Public Administration or other institutions. Households spent € 586,554 million on final consumption in 2009, which is equivalent to 88% of their net disposable income. The expense on final consumption of households accounted for 73.5% of the total expense on final consumption in the economy as a whole. Gross saving by households (€ 131,120 million) was more than one half of total savings in the economy as a whole, and there is no doubt that non-remunerated work made a significant contribution to that.

Net saving doubled in comparison with 2008, and was 9.3% of the net disposable income, and virtually quadrupled that generated by the economy as a whole.

Adjusted disposable income is more accurate than disposable income; it includes collective consumption and the adjustments due to variation in the households' pension fund contributions.

The *accumulation account* records the changes in the net wealth due to saving and capital transfers. In 2009, the balance of capital transfers collected and paid by households (which includes investment support and taxes on capital) was € 84,771 million; three times that of the economy as a whole.

Households contributed 26% to "gross capital formation" and its financing capability was € 70,023 million, which is in stark contrast with the finance requirement (€ -53,978 million) produced by the economy as a whole.

As can be observed, the national accounts collate the monetary flows in which households play a part with a fair degree of accuracy,

but they reveal nothing about the flow of non-monetary resources which constitute their central axis.

3.2. The barriers between households and the market

3.2.1. The source of household income

In colloquial language, income only means net cash income, but in the economic analysis of households, it is necessary to bear in mind the income which — as has been seen in the preceding paragraph — households receive without actually seeing it (Social Security payments, tax withheld, etc.), income in kind (public services, other goods and services), and what is at first sight less understandable, imputed income. Of all imputed income, the most important is the dwelling, as has been seen in previous paragraphs, which is considered to be equivalent to the rent which it would be necessary to pay for the use of the property if it was not owned. In Spain, with a high proportion of owner occupiers, the estimate of income varies materially depending upon whether or not this is taken into account, and this is sufficient to change poverty indicators, and, as a consequence, many social policies.

Households receive their income principally through the export of work to the monetary economy, both in the form of wages and salaries and in the form of mixed rents (business owners and the self-employed), and income received after their working life is over (retirement pensions). Moreover, they receive other income from the market, the Government, and other households, such as the yield on property (rent), yield on capital (interest, dividends), transfers from public bodies (family protection, housing subsidies, social assistance), and transfers from other households.

Only 6.1% of households receive rents from property in Spain, but the sum is not inconsiderable (€ 6,562 per year, according to the Living Conditions Survey 2009). Capital income is frequent, but limited in quantity: one third of households report that they receive these (26.9%; it was 33.2% in 2008), but the average yield is € 975 per year (this was € 653 in 2008).

As far as income received from the Government and other public bodies is concerned, social welfare benefit is very infrequent (only 1.0% of households receive this), and the average annual

amount is € 1,742 (this was € 2,692 in 2008). Receiving income from family benefit is rather more frequent (4.1%, with an average sum of € 2,639 per year), and housing support (1.5%), with an average value of € 2,058 per year⁴⁴ (this was € 2,155 in 2008).

With respect to transfers between households, generally united by family relationships, the Living Conditions Survey 2009 enables us to estimate that 3.2% of households receive from, and 6.5% of households pay transfers to other households (in 2008, these were 2.6% and 6.1%, respectively). The explanation for this disparity must lie in international transfers, because the receiving households do not fall within the scope covered by this survey. It is also possible that receiving households may receive help from various different households, and/or that transfers paid are remembered better than transfers received. The average income sent per household was € 3,262, and that received € 3,792. The disparity in the sums may be due to the same cause, that those who receive transfers in Spain receive greater amounts than those who received them from Spain.

Table 3.6 shows the distribution of households by their principal source of income. The table is interesting due to the information on the composition of households: there are numerous households of pensioners and the retired, almost one third of the total number of households, with less than one quarter of the number of people living in them. Households of employees are the majority (49% of the total number of households), and contain an even higher proportion of people (54%). In two years, the percentage of households living on benefits has more than doubled.

Immigrant workers in general occupy the lowest strata of the labour market, and their income is less than that of Spanish workers (Table 3.7). The differences are greater in hourly wages than in monthly wages, because it is less frequent for them to work part time.

The average income of women is almost 30% lower than that of men, of whatever origin, because it is proportional to the wage and to the years over which contributions have been made (Table 3.8).

⁴⁴ More information on this question is included the section 3.4 (p. 180) on the relationship between households and the State.

TABLE 3.6: Distribution of households, by principal source of household income, 2007 and 2009

	2007				2009			
	Households	Percentage	People	Percentage Average size of household	Households	Percentage	People	Percentage Average size of household
Total	16,103,177	100.0	44,120,939	100.0	16,858,669	100.0	45,146,733	100.0
Not stated	114,410	0.7	371,549	0.8	118,814	0.7	368,889	0.8
Self-employment	2,127,520	13.2	6,850,374	15.5	2,079,799	12.3	6,479,209	14.4
Employment	8,372,929	52.0	25,350,165	57.5	8,310,999	49.3	24,521,084	54.3
Contributory and non-contributory pensions	4,916,090	30.5	10,128,319	23.0	5,202,112	30.9	10,649,809	23.6
Unemployment allowances and benefits and other allowances	350,523	2.2	983,944	2.2	903,560	5.4	2,614,215	5.8
Property and capital income and other regular income	221,704	1.4	436,587	1.0	243,385	1.4	513,526	1.1
				1.97				2.11

Source: Prepared by M.A. Durán using data from the Family Budget Survey 2007 and 2009 (INE 2007, 2010).

TABLE 3.7: **Adults with ordinary income by type of income, average net annual income, and gender***

Type of income	A Total persons (in thousands)	B Percentage of income over employment income	C Men (‘000 persons)	D % of income over employment income	E Women (‘000 persons)	F % of income over employment income	G % women’s income over men’s income
Employment							
Persons (thousands)	19,098.1		10,453.3		8,644.8		
Percentage of persons	49.7		55.5		44.2		
Average income in 2007 (€)	15,414.0	100.00	17,293.0	100.00	13,143.0	100.00	76.00
Self-employment							
Persons (thousands)	2,905.2		1,984.8		920.4		
Percentage of persons	7.6		10.5		4.7		
Average income in 2007 (€)	9,492.0	61.58	10,248.0	59.26	7,859.0	59.80	76.69
Unemployment benefits							
Persons (thousands)	3,165.0		1,692.7		1,472.4		
Percentage of persons	8.2		9.0		7.5		
Average income in 2007 (€)	3,932.0	25.51	4,189.0	24.22	3,636.0	27.66	86.80
Old age benefits							
Persons (thousands)	7,039.7		3,791.5		3,248.2		
Percentage of persons	18.3		20.1		16.6		
Average income in 2007 (€)	11,341.0	73.58	13,376.0	77.35	8,965.0	68.21	67.02
Widowhood benefits							
Persons (thousands)	564.6		100.7		464.0		
Percentage of persons	1.5		0.5		2.4		
Average income in 2007 (€)	7,032.0	45.62	5,369.0	31.05	7,393.0	56.25	137.70
Sickness benefits							
Persons (thousands)	536.9		291.6		245.3		
Percentage of persons	1.4		1.5		1.3		
Average income in 2007 (€)	4,618.0	29.96	4,750.0	27.47	4,462.0	33.95	93.94
Invalidity benefit							
Persons (thousands)	835.2		549.5		285.8		
Percentage of persons	2.2		2.9		1.5		
Average income in 2007 (€)	9,341.0	60.60	10,430.0	60.31	7,245.0	55.12	69.46
Education support							
Persons (thousands)	699.5		285.3		414.2		
Percentage of persons	1.8		1.5		2.1		
Average income in 2007 (€)	1,392.0	9.03	1,342.0	7.76	1,427.0	10.86	106.33

* According to this survey, in 2008 there were 38,042,700 adult persons and 33,897,100 persons receiving income (89 receiving per hundred persons).

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2009 (INE 2010).

TABLE 3.8: Index of gross monthly and hourly wages and salaries in 2009, by nationality*
(percentage)

Nacionality	Monthly salary (indices)	Hourly wage (indices)
Total	100.0	100.0
Spain	102.1	102.2
Rest of Europa	78.6	73.9
Rest of world	66.7	65.7

* Wage earners who worked for less than one hour during the week prior to the interview.

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2009 (INE 2010).

Only the widowhood pension, which is transferred to the surviving spouse, is higher on average for women than for men.

3.2.2. The capacity of households to acquire merchandise

The expansion of the market economy occurs simultaneously with the externalisation of services which were traditionally produced within the home. These include, among others, the services of providing food, cleaning, health care, education, security, transport, and obtaining credit.

Externalisation requires the creation of appropriate infrastructures (restaurants, company canteens, hotels, cleaning companies, schools, hospitals, banks) and the training of specialists. Both the infrastructure and the training of specialists require copious investment, which may be met by private, public, or non-profit-making entities. In principal, specialists provide services of higher quality than the non specialists who remain in the home, and their wages are also higher. If productivity increases considerably, the final price of the service may be lower than that of the service produced by the non-specialist, but the comparison of services produced by specialists and non-specialists frequently makes no sense, because they are different services provided in different places and at different times.

Together with the availability of infrastructure, technology, and specialists, services replacing households' benefit from mass production and the ensuing economies of scale. Externalisation has its

spatial correlation in the transfer of the place in which the services are provided: from the household to other locations (the premises of the company, Public Administration, etc.). Nevertheless, some externalised services continue to be provided in the home by paid workers, both specialists and non-specialists.

The work which is carried out and consumed in the home, without becoming linked to goods or services which are subsequently resold in the market with added value, is usually known as *unproductive work*, but this term is hardly appropriate. It leads to a conceptual confusion and has very negative connotations both morally and in terms of efficiency. It would be more appropriate to label it as *work for the production of family self-consumption services*.

The capacity of the household to contract services, both from specialists and from non-specialists depends on their relative level of income. When income is distributed very unequally, households from middle and high levels are able to purchase long-term services from workers at lower wage level, and very short-term services from workers at higher wage levels. Households with a low level of income are unable to purchase any type of service. They only gain access to the services if they are subsidised (the redistribution of collective goods through the State), or free (donations, volunteer work). In order to cover the rest of their needs, they are obliged to limit themselves to those services which can be produced by the members of the household themselves.

If the distribution of income is relatively equal, only households which belong to the highest deciles are able to purchase long-term services. That is why constant pressure is exerted by large sectors of the population, which correspond to the intermediate deciles of income, to import work from labour markets in which the average price of work is lower, or where there is a greater degree of internal inequality. Or, in other words, having recourse to provincial, national, or international immigration. In this aspect, households act in the same way as companies, seeking to reduce the cost of labour.

Comparison between individual incomes says little about real living conditions, because virtually the entire population lives in households and shares their income with the family members living with them, in addition to using the wealth and basic equipment

jointly. Some of the more precise sources of information on income refer to individual incomes, including the majority of tax sources. Other sources, such as the Living Conditions Survey, are not so reliable in respect of income, but they do permit an approach to the subject to be taken from the point of view of households.

The aggregation of the income which each member of the household earns, as well as income which is obtained jointly, is known as the *household income*. When this is divided by the number of household members, the average income per person is obtained. And weighting the members of the household by the *Oxford scale*⁴⁵ (OECD), which takes into account age and relative position, gives what is known as the *average income* per unit of consumption (Tables 3.9, 3.10, and 3.11).

In Spain the lowest average income per household relates to single person households (they only obtain 50% of the average of all households), this is due to the fact that there are many elderly, widowed or retired persons who live alone. Nevertheless, their average income per person is higher than all types of households (136.7% with respect to the average). They adapt to what they have, they benefit from certain public services (transport, medicine), their mortgages are paid, and they do not express any more anxiety or less satisfaction about making ends meet at the end of the month than the population on average (Fundación Encuentro 2010)⁴⁶. Households in which more than two adults live together achieve the highest average income per households, but if they live with dependent children their income per person is only 80% of the average. Households in which a single adult is responsible for dependent children have average incomes, but their income per person is the lowest of all types of household (66.9% of the average).

3.2.3. The poverty threshold: multi-dimensional indicators

Research into poverty, which gathered new strength in 2010, the World Anti-Poverty Year, has focused on economic poverty, taking

⁴⁵ The *Oxford scale*, also known as the OECD scale, assigns 1 point to the first adult in the household, 0.7 to each of the remaining adults, and 0.3 to each child below the age of 14 years old.

⁴⁶ If compared with the income per capita it is 16% lower, if compared with income per household, it is 20% lower.

TABLE 3.9: Average net annual income per household, per person, and per consumption unit (2009), by age and gender of reference person
(average income in Euros)

	Average income per household	Percentage	Average income per person	Percentage	Average income per consumption unit	Percentage
Total	26,500	100.0	9,865	100.0	14,948	100.0
From 16 to 29 years of age	24,434	92.2	10,737	108.8	15,185	101.6
From 30 a 44 years of age	28,254	106.6	9,627	97.6	15,372	102.8
From 45 to 64 years of age	30,595	115.5	10,120	102.6	15,502	103.7
65 years or more	19,245	72.6	9,555	96.9	12,997	86.9
Men						
Total	27,931	100.0	9,939	100.0	15,190	100.0
From 16 to 29 years of age	23,322	83.5	10,671	107.4	14,763	97.2
From 30 to 44 years of age	28,422	121.9	9,814	92.0	15,616	105.8
From 45 to 64 years of age	31,845	112.0	10,146	103.4	15,687	100.5
65 years or more	22,042	69.2	9,552	94.1	13,442	85.7
Women						
Total	24,272	100.0	9,737	100.0	14,524	100.0
From 16 a 29 years of age	25,852	106.5	10,815	111.1	15,677	107.9
From 30 a 44 years of age	27,968	108.2	9,320	86.2	14,971	95.5
From 45 a 64 years of age	28,334	101.3	10,069	108.0	15,130	101.1
65 years or more	15,876	56.0	9,559	94.9	12,253	81.0

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2009 (INE 2010).

individual and family income as the principal indicator, contributing to a lack of satisfaction among users and poor utility for the purposes of the adoption of public policies. Indicators of poverty, whatever they may be, generate considerable controversy, and even more so if they are used to make comparisons at a world-wide level,

TABLE 3.10: Average net annual income per household, per person, and per consumption unit (2009), by size of household
(average income in Euros)

	Average income per household	Percentage	Average income per person	Percentage	Average income per consumprion unit	Percentage
Total	26,500	100.0	9,865	100.0	14,948	100.0
1 member	13,457	50.8	13,457	136.4	13,457	90.0
2 members	24,137	179.4	12,069	89.7	16,128	119.8
3 members	30,186	125.1	10,062	83.4	15,694	97.3
4 members	33,811	112.0	8,453	84.0	14,609	93.1
5 members or more	36,278	107.3	6,890	81.5	12,425	85.1

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2009 (INE 2010).

or between countries which are very different or of unequal wealth. Some critics (Deaton 2010) propose that the demarcation of the “lines of extreme poverty” (a dollar a day, according to the Millennium Development Objectives, MDO, of the United Nations) should be revised, as should the meaning of the “purchasing parity indices”, together with specific indicators such as the “housing value computation”. Deaton proposes that greater use should be made of subjective indicators of the feeling of poverty (given that he is the president of the American Economic Association – AEA, this should be taken into consideration). Some indicators of poverty by household have been refined by weighting them for the phase in the life cycle and age of the members of the household. The availability of comparable sources of statistics, for example the European Community Household Panel (PHOGUE), has facilitated international comparative analysis in some regions. Following a line of research popularised by Amartya Sen, *poverty* is analysed from the point of view of incidence, intensity, and duration. More recent research has been dynamic, that is to say, it focuses on the processes of getting into and out of poverty, and also on estimates of risk, and the social and economic policies intended to prevent it.

The definition and operativisation of poverty determines any subsequent estimate of its volume or intensity. Some indicators refer

TABLE 3.11: Income per household, per person, and per consumption unit, by type of household
(Euros)

	Average income per household	Percentage	Average income per person	Percentage	Average income per consumption unit	Percentage
Total	26,500	100.0	9,865	100.0	14,948	100.0
Single-person households	13,457	50.8	13,457	136.4	13,457	90.0
1 adult with 1 or more dependent children	18,112	134.6	7,447	55.3	11,598	86.2
2 adults without dependent children	24,389	134.7	12,194	163.7	16,259	140.2
2 adults with 1 or more dependent children*	30,230	123.9	8,230	67.5	14,516	89.3
Other households with dependent children	35,835	118.5	7,971	96.9	13,453	92.7
Other households without dependent children	35,030	97.8	10,367	130.1	15,991	118.9

* Dependent is understood to mean all children of less than 16 years of age and persons from 18 to 24 years of age who are not economically active at least one of whose parents is a member of the household.

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2009 (INE 2010).

to *absolute poverty* (for example, a population which lives on less than one or two dollars per day), but the majority are proportional to the average income of the reference group or country. The *Multi-dimensional Poverty Index* (MPI) was established by the Oxford Poverty and Human Development Initiative (OPHI), and has been calculated for more than one hundred countries. Even where there is a general consensus that poverty cannot be understood merely as the scarcity of consumption of market goods, and that multi-dimensional research is required, the MPI has received substantive criticism. In the opinion of Ravallion, the index suffers from two fundamental problems. The first is purely methodological in that, for reasons of internal consistency it can only be prepared using materials extracted

from the same survey, and this prevents it from using other, better, sources for specific dimensions of poverty. The second is more serious, in that it contains an implicit leveller of its components which is highly disputable. Of the ten components of the index, two refer to health (infant mortality and malnutrition), two to education (enrolment rates and years of schooling), and six to living conditions, among which the wealth of the household and its access to public services are included. By giving the same weight to each of these three groups, it turns out that for example, the death of one child is measured by a similar scale as having a dirty floor, or the increase of the average lifespan in a rich country has a value four or five times greater than the same increase in a poor country (because it is valued on the basis of GDP). For the purposes of the adoption of policy decisions at a country level, the MPI is of limited use.

The response of the authors to the criticisms outlined is that the MPI is an improvement on the HDI because it provides a synthetic view which can be applied to any subject (person, ethnic group, country), it does not measure achievement but deprivation, and moreover, it can be broken down and referred to a lower level of aggregation. In the crucial question of the assignment of weighting to each sub-index, the defence of the MPI is coherent; a weighting is assigned instead of a price because of the enormous difficulty in ascribing a monetary value to conditions which are not purchased and sold in the market (illiteracy, morbidity), and which vary enormously between countries. Although it falls down as regards the quality of its sources in that it is limited to one single survey, the MPI does make it possible to know how much deprivation is accumulating in any one person or group, and that is not possible with the MDOs.

In the debate on poverty, the positions are clear and open, to be improved by means of public discussion and new theoretical or empirical contributions. It can be foreseen that in the near future other dimensions of poverty may be added where currently there is no data, such as violence, work in the black economy, lack of empowerment, isolation, or humiliation (Alkire 2010).

3.2.4. Protection of the family against poverty

In Spain, there is a rich current of research in this field, promoted both by non-profit making institutions and by the national and re-

gional autonomous governments. Small variations in the definition or in the indicators employed, the reference period (quarterly, annual), the seasonality of income, the existence or otherwise of longitudinal sources and the manner in which the indices are constructed give rise to wide disparities in the final results. For example, depending on which index is applied to the measurement of poverty in Spain between 1985 and 1990, it fell moderately (20%) or heavily (80%) (Cantó, Del Río, and Gradín 2002). The family acts as a general “buffer against unemployment”, and against the lack of employment for young people, and it is estimated that one half of unemployed individuals enjoy some type of family protection which prevents them from falling into poverty. According to estimates by García-Serrano, Malo, and Toharia, using data from the PHOGUE, during the period before the crisis of 2007, between 1994 and 1996, some 12.7% of people fell below and rose above the poverty line. Together with these fluctuating poor, some 9.8% were permanently poor, and 75% were never poor at any time (Cantó, Del Río, and Gradín 2002). Upon the arrival of the crisis, the role of the family and households became more important in preventing poverty, and solidarity plays a crucial role in this area through the use of non-remunerated work.

More recently, interest in poverty has given way to other more sophisticated conceptualisations which are more difficult to measure, such as “relative deprivation”, marginality, or social cohesion. The European Council now defines the *poor* as “persons, families, and or groups of persons whose resources (material, cultural, and social) are so limited so as to exclude them from the minimum acceptable way of life in the Member State to which they belong”; and research is being directed towards the multi-dimensional analysis of poverty. In the case of Latin America, CEPAL has underlined the multi-dimensional nature of poverty and highlights that being a woman, belonging to an ethnic minority, or living in rural areas, are clear social disadvantages, and restrict the options for enjoying an adequate standard of income and opportunities (CEPAL 2006: 150 et seqq.). In Spain, although a statistical association between the indicators of poverty and deprivation has been found, this association is not strong at all levels of income, and is at its weakest at intermediate levels. 68% of the population comprises the group of not-poor and not-deprived, while 7% is poor and deprived. 13% is not-

poor but is deprived, and 12% is poor and not-deprived. Regionally, the association is even weaker, as a result of the varying production structures and the peculiarities of the regional autonomous government social policies (Ayala, Jurado, and Pérez-Mayo 2009). Estimates of poverty and inequality change radically in all countries when value is given to non-remunerated domestic work, which acts as a levelling factor between multi-income and single income households (Mattila-Wiro 2010).

The Living Conditions Survey employs a number of different indicators to measure the economic difficulties of households: whether the budget reaches the end of the month, being able to afford a holiday at least once a year, being able to afford meat or fish at least once every two days, keeping the dwelling at an appropriate temperature, and being able to meet unexpected expenses. In 2010⁴⁷, the basic intake of protein was only problematic for 2.5% of those interviewed (in 2009 this was 2%), while the temperature of the home was a problem for 7.2% (in 2008 this was 5%). Unexpected expenses could not be met by 36.7% (in 2008, it was 28%), and holidays by 39.7% (in 2008 it was 33%). Young people, those over the age of 65, and women are the groups with the greatest difficulties according to all of the indicators. Difficulty in obtaining protein goes up by almost a factor of ten depending on the level of income, and affects from 0.5% at the highest level up to 4.7% at the lowest level; heating, from 1.2% up to 12.2%; unexpected expenses, from 10.6% up to 51.3%; and holidays, from 14.3% up to 56.4%.

Another indicator of difficulties is being unable to attend a dentist, a service which is barely covered by Social Security; 9% of those interviewed and who needed to did not go to the dentist in 2009. The reason given for not going was most often money (45% of those who did not go), but other reasons, including a lack of time, were also common. Among those who did not go to the dentist, lack of money was the reason given by 40% of men and by 50% of women. A greater proportion of men claimed that they lacked the time as compared to women, particularly in the intermediate age ranges. Depending on levels of income, financial reasons were given 2.5 times more often at the lowest level than at the highest, and the

⁴⁷ Advance notice of the results for 2010, published in 2011.

reverse was true when the reason given was lack of time. Financial reasons were alleged by a 75% higher proportion of non-European immigrants than of Spanish citizens (73% as against 42%).

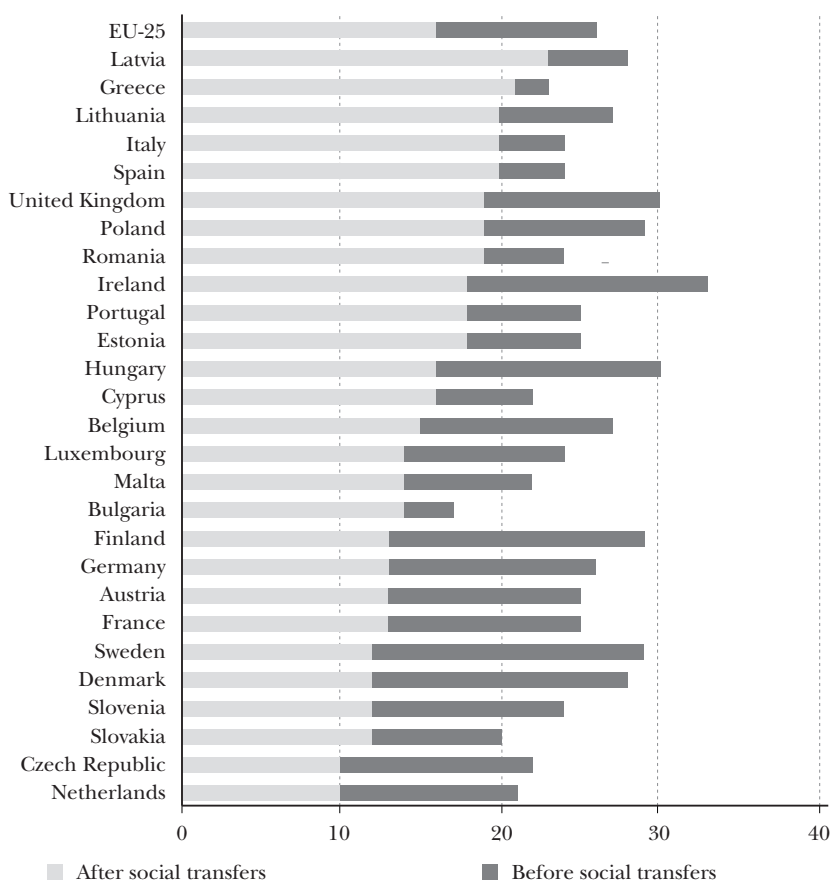
Availability of money and the expense itself are not exactly equivalent. According to the Living Conditions Survey 2010, some 77.85% of those over the age of 18 spend money on themselves every week, in addition to essential expenses. The proportion of those who spend money on themselves declines without interruption with age (88% of those younger than 30 years old, 60% of those over the age of 60 years old), but this is due less to being unable to afford it (this reason is put forward by 9.5%) than to other reasons. It is precisely these “other reasons” which give depth to the behaviour of the subjects, over and above their strictly material situation, or the availability of financial resources. The other reasons increase very rapidly with age; among young people they are less frequent than not having the money, but at 65 years of age they are three times more frequent (30% as opposed to 10%). Differences between men and women are visible, and while 81% of men spend money on themselves every week, only 74% of women do so, and they stop doing this both because they do not have the money (7.8% of men, 11.1% of women) and for other reasons (10.7% of men and 14.6% of women). Although the differences are not apparently very great, in relative terms they are equivalent to differences of 30% in the capacity to spend on themselves.

In 2010, according to the same survey, 41.2% of households reach the end of the month with some or considerable ease, and the rest with difficulty, and it is striking that there are 13% who do so with great difficulty.

3.2.5. Non-monetary resources

The most commonly employed indicators of poverty only make reference to disposable income, and totally ignore the capacity of households and individuals to produce non-monetary resources. They also have great difficulty in incorporating available resources through the *hidden*, or informal, economy, particularly when reference is made to international comparisons. In the case of Europe, Graph 3.3 illustrates the proportion of people at risk of poverty before and after social transfers.

GRAPH 3.3: Persons at risk of poverty, Europe-27, 2006
(percentage of total population)



Source: Eurostat, «Key Figures on Europe, 2009 edition» p. 90.

Inequalities between households are parallel to the inequalities which occur at the level of the individual. People at a potentially employable age in Spain have a medium risk of poverty: this affects one in every seven people. Nevertheless, the risk almost doubles for children of less than 16 years of age, and for people over the age of 65, even when allowance is made for social transfers. The risk of poverty among women is higher than that faced by men at every moment of the life cycle. Whereas for women as a whole the risk is 15% higher than for men, between young people from 16 to 29

years of age it is 17% higher, and for women older than 65 it is 18% higher than for men of the same age (Table 3.12).

Integrating into the labour market is the best antidote to the risk of poverty. Only one in ten employed people run the risk of poverty (10.6%). The relationship with the labour market is more frequent and more intense among men than women, and therefore in general men are better protected against the risk of poverty than women. Nevertheless, if the relationship with employment breaks down, as in the case of unemployment, the risk of poverty increases threefold, even after social transfers. It is higher for formerly employed men (46.2%) than for formerly employed women (31.6%), specifically because women invest — willingly and/or through obligation — a smaller part of their resources in the labour market and form partnerships with a men with higher propensity for employment.

Studies on poverty carried out in Europe highlight that the risk of falling into poverty, just as of not getting out of it, is strongly associated with the size of the household (number of members); but the centrality of this item is inseparable from the very definition of poverty, understood as the mere availability of monetary resources (Martín et al. 2008).

TABLE 3.12: Persons at risk of poverty by age and gender, after social transfers. Spain
(percentage)

Age	Both Genders	Men	Women	Percentage Women/Men
Total	19.6	18.3	21.0	114.8
Less than 16	24.0	23.2	24.9	107.3
From 16 to 24	21.5	19.9	23.3	117.1
From 25 to 49	15.5	14.6	16.4	112.3
From 50 to 64	16.9	16.3	17.5	107.4
65 years of age and above	27.6	25.0	29.5	118.0

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2008 (INE 2009). Poverty indicators from the National Action Plan for Social Inclusion.

The most commonly employed definition of *poverty* is relative: a person is not poor because they have little, but because they have much less than everyone else. For statistical purposes, persons or households are considered to be below the poverty line when their income is 60% or less of the median in the reference group (country, region, etc.). This definition is very simple but it admits multiple nuances depending on whether the income is ordinary or extraordinary, gross or net, before or after social transfers. And above all, depending on whether or not it is weighted by the number of members which compose the household. When income is weighted by the number of household members, it can also be weighted by the age of the family members, assigning the same or a different weighting depending on the needs attributed to them. The majority of research studies into poverty make use of data on monetary resources, such as income, and rarely have sufficient data available on other basic resources of wealth and capital goods such as the home (Menéndez and Pagnotta 2010), the car, or in previously incurred debts.

For the purposes of international comparison, mean income means little in countries or groups with large internal inequalities. It is also very much influenced by the differences in the internal price levels or in purchasing parity.

3.2.6. Households at risk of poverty in Spain.

The WI Index

The change in the average income in Spain between 2003 and 2008, in current currency, was positive, with a growth of approximately 25%. Despite the start of the economic crisis, there was also growth between 2007 and 2008. The rate of growth was almost 6% higher in the indicator of income per capita than in that of households, because of the contraction in the number of persons per household. The indicator of change by units of consumption is, as has already been indicated, is highly disputable, because it is based exclusively on the OECD scale and applies heavily decreasing consumption scales as a function of the age of the members of the household. This indicator does not take into consideration the heavy workload which the presence in the household of children, sick people, or the elderly entails, and which makes it difficult to

export the workforce to the labour market. In households which are over-burdened with care, poverty is lurking just around the corner.

The Living Conditions Survey 2009 reflects an increase in the difficulty experienced in coping with certain expenses in the year 2007, but not in all types of consumption. For example, it did not affect the basic protein consumption indicator, and some indicators were better than in 2005 and 2004, when the Spanish economy was still going through an expansionary phase. In short, in the year 2009 the proportion of households which experienced difficulties making ends meet at the end of the month grew in comparison with the year 2007. In particular, the group which reported having greater difficulty grew in relative terms by 33% (from 10.3% to 13.7%), and it was clearly worse than in 2005 and 2004. In the data published in 2010, this indicator improved slightly, although other indicators worsened slightly⁴⁸.

If a “scale of financial difficulty”⁴⁹ is applied to households, with a maximum possible score of 300 points, in 2009 the index of difficulty would be 53 points, while in 2007 it would have been only 32 points (Table 13.13).

Even after receiving social transfers, the risk of poverty is distributed unequally between Spanish households. The impact of false declarations of income and the failure to take into consideration important economic assets or debts may be disputed, and in fact is. It may also be pointed out that the mechanical treatment of children as divisors of the family income leads to an excessive statistical pauperisation of the households of large families. In spite of this, the Tables contributed by the Living Conditions Survey are very conclusive, as is highlighted by Table 3.14; the risk of poverty in single person households for women is twice that of men, and for those older than 65 years of age twice that for those who have not reached that age, and in the case of two parent households the risk

⁴⁸ INE, 21 October 2010. Provisional data from the Living Conditions Survey. The average annual income of households decreased by 2.9% in comparison with the previous year. 20.8% of the population was below the relative poverty line, as against 19.5% in the previous year. The ageing of and reduction in size of households are other factors to be taken into account, in addition to the economic crisis.

⁴⁹ The *household scale of difficulty* consists of the following scale: reaching the end of the month with great difficulty = 3 points; with difficulty = 2 points; with some difficulty = 1 point; fairly easily = -1 point; easily = -2 points; very easily = -3 points.

TABLE 3.13: Change (2003-2008) in average net annual income per household, per person and per consumption unit
(average income in Euros)

	2003	2004	2005	2006	2007	2008	2009	Percentage 2009/2003
Average income per household	21,551	22,418	23,442	24,525	26,010	26,429	26,500	123
Average income per person	7,591	7,925	8,403	8,916	9,560	9,839	9,865	130
Average income per consumption unit	11,708	12,149	12,877	13,613	14,535	14,911	14,948	128

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2009 (INE 2010).

for those who have three or more children is 2.3 times higher than for those who only have one.

If there are financially dependent children in the household, the risk of poverty increases by 24% in comparison with households where there are none. Households with children where two parents are living put up a better defence against poverty than those with a single parent. In single parent households, the risk of poverty affects more than one third of households (38.2%). In households where there are two adults and where there are children to take care of⁵⁰, the risk of poverty triples when the number of children is three or more: not only because the income has to be shared, but also because it is very difficult for the second adult to maintain their connection with the labour market in order to earn income themselves. Going from one child to two brings with it an increase of 40.6% in the risk of poverty. Going above two children doubles the risk (203.7%) in comparison with households with two children and almost triples in comparison with households with only one child to care for (Table 3.15).

⁵⁰ Children to be taken care of are considered to those below the age of 18 years old, and those between the ages of 18 and 24 years old if they are economically inactive and at least one of their parents is a member of the household.

TABLE 3.14: Risk of poverty in households in Spain after transfers by type of household

Single-person households		Multi-person households	
	Percentage at risk		Percentage at risk
A. One man	20.9	A. Households without responsibility for dependent children	17.2
B. One woman	38.9	B. Households with responsibility for dependent children	21.7
Percentage B/A	186.1	Percentage B/A	126.2
C. One person of less than 65 years old	21.7	C. Two adults with one dependent child	18.1
D. One person of 65 years old or more	41.0	D. Two adults with two dependent children	21.6
		E. Two adults with three dependent children	41.8
Percentage D/C	188.9	Percentage D/C	119.3
		Percentage E/C	230.9
		Percentage E/D	193.5
		F. One adult with one or more dependent children	36.7
		Percentage F/C	202.8

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2009 (INE 2010). Poverty indicators from the National Action Plan for social inclusion.

TABLE 3.15: The risk of poverty in households by working hours of the adult members of the household (WI index) (percentage)

Households with dependent children by employment		Households without dependent children by employment	
None (WI = 0)	64.3	None (WI = 0)	33.6
All (WI = 1)	10.5	All (WI = 1)	6.6
Some (0,5 WI < 1)	23.7	Some (0 < WI < 1)	13.2
Some (0,5 WI < 0,5)	48.6		

Source: Prepared by M.A. Durán using data from the Living Conditions Survey 2008 (INE 2010). Poverty indicators from the National Action Plan for Social Inclusion referring to after transfers.

The size of the household is not in itself an indicator of poverty or of wealth. If a man is living there, the risk of poverty is average (21.0%) because these are frequently men in employment or with retirement income. If a woman is living there, the risk is high (40.2%), because these are frequently women who are divorced, widowed, or elderly, who are out of the labour market.

Employment is the principal source of income in Spanish households, and households where employment becomes scarce or disappears altogether run a high risk of poverty in spite of social transfers. The *WI Index (Work Intensity)* measures the proportion of time devoted to the market, as employee or as self-employed, by the members of the household between the ages of 16 and 64 years old. On this scale, zero means that no member of the household has worked during the preceding year, and 1 means that all of the members have worked during all of the months of the year. In households which devote their time to the market ($WI = 1$), the risk of poverty is low; only 10.6% of households with children are at risk, while 6.6% of households with no children are at risk. Among those who have not worked in the market ($WI = 0$), and who have children in their care, the risk of poverty is very high, and affects almost two thirds (64.3%) of households in this situation of employment.

3.2.7. The paradox of the services market: those who most need them cannot afford them

Paradoxically, the social groups which experience most need of care are those who have the least possibility of contracting care through the market. According to the Living Conditions Survey on Conditions 2009, the highest number of adults who receive ordinary income individually are employed workers, and this source estimates that there are 19,098,100 such persons; their average income is € 15,414 per year, equivalent to € 1,185 per month on the basis of thirteen payments. Nevertheless, the average annual income of those who received old age benefits was € 11,341 per year, while sickness benefit was € 4,618, disability benefit € 9,341, and widowhood pension € 7,032. These are the most important groups because of the high probability that they will need care, although there may be elderly, sick, or disabled persons who do not receive any ordinary income and are not included in these tables.

The concept of the working day of eight hours does not fit in with the requirements of the sick or disabled, because in serious cases they need permanent attention, regardless of whether it is a working day or a holiday, or of whether the working hours are day-time or night-time. In order to cover the need for care of a seriously dependent sick person, several people are necessary, in successive shifts to cover the entire twenty-four hours period, with substitutes for holidays. If such shifts are adapted to strict employment criteria, and care is taken to be equivalent to work, each sick person requires five people to look after them: three shifts every day with two shifts with substitutes for Sundays, Public Holidays, and holidays. This is what happens in health institutions, where the workers are constantly changing their shifts, although the ratio per patient can be less because they can attend to several patients at the same time. Given their low income, it has to be assumed that both sick people and the disabled who receive benefits have all their financial needs for housing, food, and health covered by other means, such as donations from family members or by the sale of previously acquired capital.

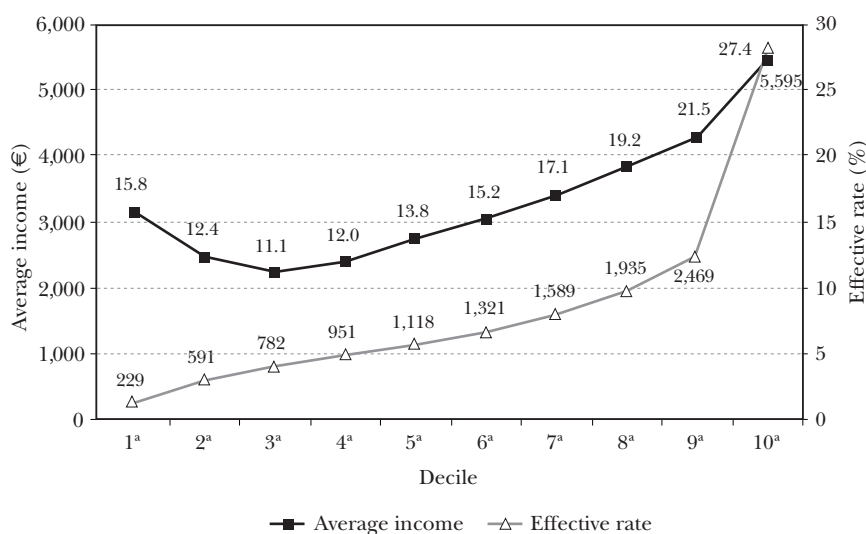
The total income of households is the accumulated sum of the incomes of their members, and of the investment assets which they own together. In Spain, one of the best sources for discovering the distribution of incomes is the *Sample Returns for Personal Income Tax* (IRPF), although it refers to taxpayers (individual and joint) and not to households, and only to those who consider that they have a legal obligation to submit a return on their income. In 2005, a total of 17,105,088 income tax returns (IRPF) were submitted (Picos 2009). According to the Living Conditions Survey 2008, 72% of households submitted an Income Tax return, either jointly or by one of the members of the household; or to put it another way, 28% of households did not make an Income Tax return.

As may be seen in Graph 3.4, which gives the distribution of income by deciles, the average taxable income of the first decile was € 2,938 per year, while this table reached € 72,741 per year in the tenth decile. Overall, income arising from employment provided 80% or more of the total income of the taxpayers, and only those belonging to the two outermost deciles form an exception; in both the first and in the last, income from employment was the greater part, but only contributed 70% of total income. In the first decile

there is a high proportion of income (even negative) which comes from farming and pastoral business activities, and also from profits from assets gained in less than one year. Included in the highest decile are abundant profits from assets held for longer than one year are common. As a result of tax credits, the effective average rates hit a minimum in the third decile (11.06%) and the maximum in the last decile (27.39%)

The last decile cannot be analysed by taking the average as the principal indicator, because it contains an enormously wide range of incomes. The cut-off is set at incomes of higher than € 37,629 per year, equivalent to € 2,894 per month, plus two half payments (13 monthly payments per year), but income arising from capital gains of greater than one year in duration are concentrated at the extreme. The highest income reported (€ 47,650,790) was 1,288 times higher than that of the cut-off where this decile commences, and has little to do with the income of the majority of the taxpayers in

GRAPH 3.4: Estimated average monthly income and effective rate*
(Euros and percentage)



* The *average monthly income* is defined as the annual income divided by thirteen.

Source: Prepared by the author using data from Picos et al. (2009). Institute of Fiscal Studies (Instituto de Estudios Fiscales), Document no. 9/2009.

this same decile. If the annual taxable income is divided into thirteen monthly payments in order to bring it into line with wages and salaries, the average monthly income before tax in this maximum decile is € 5,595 per month.

In the ninth decile, the average monthly income is € 2,461. The average personal income tax (IRPF) rate in respect of the last decile is 27.39%, and for the ninth, 21.5%.

Evidently the majority of taxpayers live in households, and live with other adults who have shared wealth or their own income. The personal income tax (IRPF) returns in the cited sample cannot be aggregated by households or other form of family relationship. Nor do they cover all of the possible forms of generating income, and nor do they completely omit evasion by taxpayers. In spite of this, overall it is the most reliable source in Spain, in particular for employees and pensioners.

The Survey of the Working Population is also useful in trying to find out the purchasing power of households, although it does not offer information about levels of income. It defines *income earners* as “those who have reported that they have work, receive a retirement pension, or some other pension, or receive unemployment benefit”. According to this source (1st Quarter 2011), there was a total number of 17,281,200 households in Spain. It estimates the total number of people living in housing as 45,900,300, of whom 38,513,000 are over the age of 16. In spite of the economic crisis, the number of households increased by 165,000 in comparison with the previous two years.

If they were to be evenly distributed, each household would have 2.25 people over the age of 16 years, and therefore the same number of potential income earners. But in reality, the distribution of earners is heterogeneous (Table 3.16). The most frequent situation is for households only to have two income earners (43% of households), although households with only one income earner are almost equally common (41%). If the incomes of all earners were to follow a distribution similar to that which the sample returns for personal income taxpayers highlights, the income of households with several earners would be double, triple, or four times that of households with only one earner. In reality, in the majority of households, there are principal and secondary earners. Although, as a general rule,

households with several earners are richer than those which only have one, there is no strict correlation between the number of earners and the value of the income of the household. The LFS offers no information about the value of the incomes, and therefore, in spite of their multiple sources of income, some households with multiple earners may receive low levels of income per capita.

The Survey on Family Budgets (EPF) is particularly orientated towards detecting changes in consumption, and it is indispensable for analysing the economy of households. It is as reliable a source as the IRPF sample, because it tends to underestimate incomes, but it offers the great advantage in that the information it provides refers to households and not to individuals. In this respect it is the best source available in Spain. According to the EPF, in 2009 the most common monthly income fell into the range between € 1,000 and € 1,500 (19.79% of households). Households which exceed a monthly income of € 5,000 constitute 3.3% of all households. The distribution is more homogeneous for employees and pensioners than for all other social groups. Between 2007 and 2009, the average number of persons per household has declined in all ranges of income, and this contributes to the fact that the income per person in the household has improved if the income is not weighted by purchasing power. The only exception to this is the minimum income band, in which the average size of household was 1.44, and in which, as a consequence, the average income per person decreased.

TABLE 3.16: Households by number of income earners
(Euros '000 and percentage)

	Number of households	Percentage
Total	17,281	100.0
0 earners	514	3.0
1 earner	7,218	41.8
2 earners	7,544	43.7
3 earners	1,562	9.0
4 or more earners	441	2.6

Source: Prepared by M.A. Durán using data from the Working Population Survey, 1st Quarter 2011.

Net income is “the income remaining after paying taxes and Social Security”. As can be seen in Table 3.17, the distribution of regular net income is more homogeneous if the size of the household is taken into account than if attention is only paid to the income, because households on low incomes are small and those with large incomes are larger. In the group with the lowest incomes, which includes 4.70% of households and 2.47% of people living in households, the average income per capita is € 347 per month. In the group with the highest incomes, which includes 2.8% of households and 3.78% of people, the average monthly income per capita is € 1,351. Between the highest level of income and the lowest, there is a ratio of one to ten; nevertheless, when the income is weighted by the average size of the household, the ratio becomes 1 to 3.89; the gap is reduced to one third. The average monthly income (thirteen payments) of those receiving sickness benefit was € 347 in 2008, and the disabled received € 631.

As has already been indicated, households with low incomes have no possibility of purchasing services for the household on a long-term basis. In the year 2009, both the General Social Security Regime and the lowest levels of the Special Regime for Domestic Employees had a contribution base of € 728 per month, and there are very few, not to say no taxpayers who can arrange paid services for the home if they only receive this sum.

Due to all these reasons, it is worth the trouble to carry out the exercise of repeating the calculations made above on the basis of working days and the minimum salary, using other references. According to the Ministry of Labour and Immigration, the minimum basis for making contributions was € 24.27 per day in 2009 (Ministry of Labour and Immigration, 2009). For part time employment contracts, the minimum basis for contributions was € 4.39 per hour for levels 4 to 11 on the job scale. If these rates for low-qualified workers were to be applied to the care of the sick, the result would be that the average income for people in receipt of the sickness benefit would permit them to afford 79 hours of work at the minimum wage for labourers, and the disability benefit would allow them to pay for 144 hours. Or, in other words, the benefits enable the sick to pay for 3.29 full days of care (24 hour days without allowance for overtime) and the disabled to pay for 6 days. For the rest of the month, that is

TABLE 3.17: Households, persons, and average size of household by level of regular net monthly income of the household, 2009

Level of income of the household*	Number of Households	Number of Persons	Average size household	Percentage Households	Percentage Persons	Income per person **
Total	16,858,669	45,146,733	2.68	100.00	100.00	
Up to € 499	473,121	924,414	1.95	2.81	2.05	€ 256
From € 500 to 999	3,028,279	5,706,506	1.88	17.96	12.64	€ 399
From € 1,000 to 1,499	3,335,795	8,171,921	2.45	19.79	18.10	€ 510
From € 1,500 to 1,999	2,883,196	8,016,919	2.78	17.10	17.76	€ 629
From € 2,000 to 2,499	2,611,650	7,634,840	2.92	15.49	16.91	€ 770
From € 2,500 to 2,999	1,731,273	5,345,248	3.09	10.27	11.84	€ 890
From € 3,000 to 4,999	2,235,789	7,409,279	3.31	13.26	16.41	€ 1,208
More than € 5,000	559,565	1,937,607	3.46	3.32	4.29	€ 1,445

* The middle point of the income interval was used. At the extremes the maximum level (for the minimum) and the minimum level (for the maximum) was taken referring to the regular net monthly incomes of the household.

** Incomes of the household divided by the number of persons.

Source: Prepared by M.A. Durán using data from the Family Budget Survey 2009 (INE 2010).

24 days for the disabled and 26.71 days for the sick, the cost of care cannot be covered by means of benefits, and nor would the rest of their needs be covered.

As a result of the different classification and the time devoted to employed work, households in which the reference person is a woman have lower incomes than households where the reference person is a man. In almost all situations, the net incomes of women are around one third lower than those of men in the same situation, and the difference reaches a maximum in those who are in receipt of old age benefits. On average, the old age benefit which women receive is 67% of what men receive. Moreover, given they marry younger and enjoy greater longevity, in such households it is more probable that only one income is received (single person households) than in households in which the reference person is male (multi-person and multi-earner households). As has already been seen in Table 3.7 (p. 153) columns B, D, F, and G show the degree of income inequality by type. The “aid” for further study is only a tenth of the average employee income, and in the immense majority of cases it is merely complementary, or a help. Both the unemployment benefit and the sickness benefit are less than one third of the average employee income, but the majority do not refer to full years.

If the person who needs to arrange care services on the market is a woman, her financial capacity to obtain them would be less than that of men by the proportion shown in the table, above. Furthermore, it is much more probable that a woman would not have as many potential unpaid carers as a man of a similar age.

3.3. The limits of the market on absorbing remunerated work

3.3.1. The age and health limits of potential workers

The age and health of the population imposes limits on their capacity to assign working time to the labour market: children because of physical incapacity, adolescents because both they and the society of which they form part consider it appropriate that they should devote virtually all of their time to education⁵¹. In their quar-

terly report of May 2010 on child labour, the ILO announced that between 2004 and 2008, the number of child workers had been reduced by 3%, from 222 to 215 million. Since then the rate of decrease has slowed. With regards to adults, in addition to the social conventions, age and sickness limit their capacity to gain access to remunerated work. The real average age for retirement in Spain in 2005 was 62.87 years old for workers under the general Social Security regime. A range of stimuli to continue working and disincentives to early retirement raised this to 63.74 years old in 2009 (Fundación Encuentro, 2010).

With respect to the limitation on access to the labour market due to health, the Living Conditions Survey shows that for young people of less than thirty years of age, their level of health attained 4.3 points on a five-point scale. This falls gradually with each age band, and from 65 years old the average is only 3.1 points. In this age range, 18% of men and 27.6% of women (there is a greater proportion of the very elderly among women) have poor or very poor health. Even among young people and the mature age bands, there are people with poor health who could hardly become a part of the labour market. Among people from 30 to 44 years old, 2.5% have poor or very poor health, and this index climbs to 8.2% among those from 45 to 64 years old. At any age, the indices for women are worse than those for men. On average, people in work have a health index of 4.0 points (business owners 3.9 points, salaried employees 4.1) while for those not in work it is 3.2 points, and the retired only achieve 3.2 points. Employment acts as a filter which discards those who get sick into the inactive population.

3.3.2. The market as a reducer of employment and the analogy of the android

Markets which absorb less labour than they used to before are markets which are reducers of employment, whether because of the economic crisis, increased technology, or because one type of labour is replaced by a different type of labour, with or without territorial relocation. In spite of the fact that the market is growing, non-

⁵¹ Nevertheless, UNESCO has repeatedly called attention to the low school attendance rate and the abandonment of primary and secondary schooling in many regions.

absorption could occur if the population growth (natural or through the balance of migration), or the tendency to search for jobs increases more rapidly than the market itself. The consequence is unemployment.

For workers who cannot find their place in the labour market, and who cannot or do not wish to remain idle, there remain few options apart from migrating to other markets⁵², to place themselves on the margins of the market (informal work, etc.), or devote their capacity for work to non-remunerated work for themselves and for others. There is no limit to the amount of non-remunerated work which a person can produce, or to that which a society is able to absorb. The limit is only set by social practice and the life needs of the non-remunerated workers, which are as variable as they have been historically for remunerated workers. In a society in which non-remunerated workers, healthy adults who do not work, and remunerated workers all live together, the difficulty lies in setting the rules of exchange between the people who belong to one or the other category. These are not economic rules but social and political ones, and they depend principally on the power which each of these groups achieves.

The replacement of human labour by machinery is a historic aspiration for humanity, which is accompanied by the fear that the machine may end up by making human labour unnecessary. Up until now, mechanisation has caused short-term employment crises, but in longer term trends, the incorporation of technology into production has been succeeded by the creation of more, and better, employment. Nevertheless, the image of the robot substitute remains alive. In the same line, although only applicable to the calculation of the cost of labour, that is known as the *android analogy* is used, under the terms of which workers could be replaced by robots constructed for pleasure. The androids would not receive wages, and would not have to be paid to cover the needs of dependent family members, and their only expenses would be maintenance (batteries, etc.) (Petrosyan 2005). The analogy does not contain proposals

⁵² On the differences in productivity, in Latin America in large multinational companies, small and medium sized enterprises in the formal sector, and informal micro-companies (FIAPP 2010, 28).

but raises attention to the cost of maintenance of real workers, and the manner in which such costs are paid through the wages or are transferred to other parties who do not participate directly in the economic exchange, for example family members living with them.

3.4. The role of the State as intermediary: from households to the Treasury and vice versa

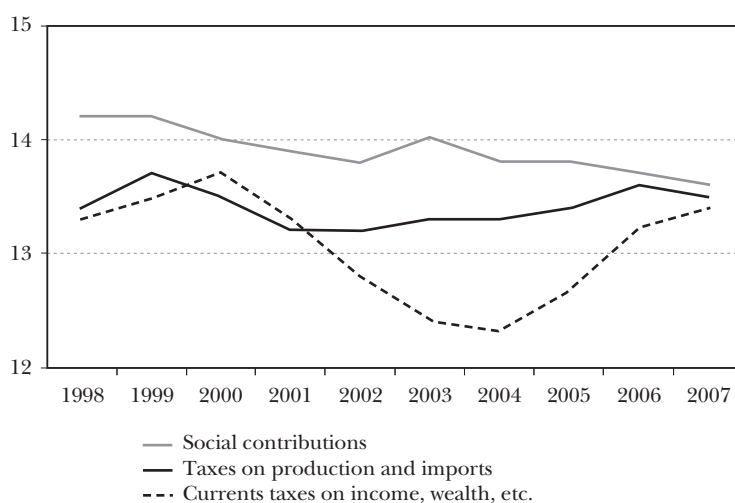
The State is the great intermediary between individuals, households, and the market. Although it produces services for itself, it finances them with resources which it obtains from companies and from households. The taxes required by governments (national, local, and Social Security) come from three principal types:

- a) taxes on income and wealth,
- b) taxes on production and on imports,
- c) social security contributions.

For the EU-27 countries as a whole, taxes constitute 40.5% of GDP, and currently are shared similarly between the three types (Graph 3.5), but the distribution varies considerably from country to country. Thus, in Denmark, taxes on income and wealth are 29.8% of GDP, while the social contributions are only 1.9%. In Spain, they are shared almost equally between the three types: 12.9% in income and wealth tax, 11.8% in production and imports, 13.0% in social contributions.

The best summary of the way in which the State prioritises its interests lies in the General National Budget, which is what happens on a different scale in every organisation. The budget is the acid test of good intentions, the filter which demonstrates the coherence between declarations and political practice. Women's movements have for years been asking for what the United Nations Conference in Beijing made official in 1995, the need to analyse the consequences which public spending has on different social groups. The basic philosophy is that political commitments should determine the budgets and not the other way round (UNIFEM 2008, 19-36). This perspective on the budget is applied to the source (where the

GRAPH 3.5: The contribution of taxation in EU-27
(percentage of GDP)



Source: Eurostat (2010, 34).

resources are extracted), to the process of distribution, and to the recipients (those who receive the benefits). For the moment, there are few public programmes which analyse the direct and indirect effect of implementation on non-remunerated work, but including it would in many cases affect the balance of costs and benefits (Villota 2004; Alarcón et al. 2010).

In its task of redistribution, the State returns resources to companies, households, and individuals, partly converted into goods and services, and partly in money⁵³. There is a debate on the optimum degree of intervention by the State and its effectiveness in managing to reduce inequalities by means of taxation. The analysis of the results of the Personal Income Tax (IRPF) in 2005, 2006 and 2007 carried out by Picos concludes that there exists “a clear tendency to increase inequality, both before and after tax, and a reduc-

⁵³ One of the resources of the State which was not expressed directly in money terms was that obtained by means of the obligatory military service. In Spain and in other countries, obligatory military service has disappeared over the last decade, and given way to a professional army subject to the labour market just like any other service.

tion in the redistribution capacity of the tax” (Picos et al. 2009).

The payment of the taxation determined by the State is known as *tax compliance*. In Spain, according to the Survey on Opinions and Attitudes to Tax, public opinion believes that compliance increased slightly over the period before 2008, with a slight reduction in fraud. Salaried employees are more critical about the tax system than other occupational groups, and state with greater intensity the belief that there is tax fraud. Business owners are, by a wide margin, the occupational group most widely cited as defrauding the tax system, with 45% of those interviewed believing this. This survey, carried out by the Institute of Fiscal Studies, does not ask for information about whether the taxes are equitable or effective, although it does enquire about the consequences of tax fraud. Only 5% of those interviewed are of the opinion that fraud does not have significant negative consequences; on the other hand, 44% are of the opinion that tax fraud reduces the resources available to finance public services and social benefits. Among young people, a majority express an attitude justifying tax fraud (52%).

The Family Consumption of Public Goods and Services Survey (2000) makes it possible to classify the relationship between households and the State in accordance with the degree of dependence of the household on public services and subsidies for daily subsistence (Table 3.18). It should be noted that this survey was carried out before the huge wave of immigration during the first decade of the 21st Century, and also before the economic crisis of 2008. The resulting typology is as follows:

- A. *Households with little dependence on the overall public supply of services and benefits*: 36% of households. These are households which could best represent the upper semi-urban classes, formed of couples with or without children, whose principal dependence on public spending lies in the area of education (in particular through associated centres), although they also benefit from public spending on housing (tax credits in the IRPF), on culture, and on sports.
- B. *Households with a high dependence on certain public goods and services*: 24% of households. These are households which best

TABLE 3.18: **Percentages of households using various services and benefits**

	Percentage of households using		
	Yes	No	DK/DA
Health (clinics and hospitals)	88	12	–
Infrastructure (motorways, ports, etc.)	83	16	1
Transport	83	15	2
Education (schools and universities)	46	52	2
Unemployment insurance	24	72	4
Retirement pensions	23	73	4
Social services (for the elderly, disabled, etc.)	21	75	4
Sickness or invalidity allowance	13	82	5

Source: Instituto de Estudios Fiscales (Martín et al. 2009).

represent the middle classes. In the make-up of this group couples with children predominate, these show a high dependence in their daily life not only on public health but also on public education, housing policies, and to a certain degree, on income through social benefits.

- C. *Households with an average dependence on public spending policies as a whole, but very dependent on certain fundamental spending policies which support their family budget:* 14% of households. Households of a heterogeneous make-up, which represent the disadvantaged classes. Without the monetary income from social benefits, their budget would be extremely diminished; they also depend heavily on public health, and in households with minor children, on public education.
- D. *Households with a high dependence on the overall public supply of services and benefits:* 26% of households. These are retired persons or pensioners with a low level of income (arising almost exclusively from social benefits), who depend heavily on

public health, social services, public transport, and when they are not the owners of their dwellings, on public support under this heading.

In general public services are heavily used in Spain, but they are poorly valued by citizens, in the same way as the opinion expressed as to whether they support the payment of taxes. In 2008 they obtained 2.4 points on a scale of 4 points, that is to say an average valuation. With respect to health and infrastructure, almost a quarter of those interviewed stated that these had improved over the past five years, and health is the service which is considered to be the most accessible to everyone (Subdirección General de Estudios Tributarios (General Sub-Directorate of Tax Research) 2008, 21). Other studies by the CIS highlight the fact that the majority of citizens trust their family more than the social services to look after them in case of need; on a scale from one to ten, confidence that they would receive help from their family scored 8.70 points, but only reached 5.32 in respect of the social services (CIS 2010a). This does not mean that the direct care provision would be performed by the family members themselves, but that it is the family who would take the initiative and handle the process.

30.9% of households receive their principal income from the State, but the percentage rises to 63.4% if secondary income is also factored in. Only 48.6% of households receive income exclusively from their work or investments, and the rest depend on the State or simultaneously on the State and their work (Table 3.19 and Graph 3.6).

3.5. Non-remunerated work and families in the economic crisis in Spain, 2007-2011

3.5.1. Other families, other crises

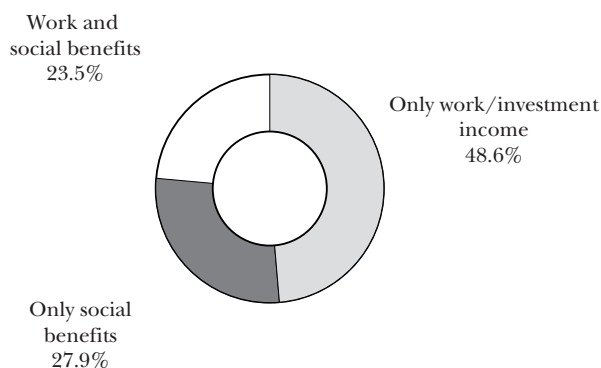
This section must begin by recalling an obvious point: that the Spanish economic crisis 2007-2010 is only one of many crises which have shaken societies and economies over recent years, and that the families referred to form only a small fraction of those who are fighting for survival throughout the world in conditions which are worse than those of the people who are resident in Spain (Gálvez and

TABLE 3.19: Distribution of households by source of income
(percentage of households)

	Sources of income in the household	Principal source of income
Self-employment	55.9	45.3
Employment	20.7	16.4
Income from capital and property	1.4	0.2
Unemployment, training, or job creation allowances	7.1	1.3
Retirement and old age pensions	28.3	20.5
Permanent disability and invalidity pensions		
Widow's, orphan's, and family members' allowances	12.5	6.4
Social wage	1.5	0.2
Other regular social allowances	3.5	0.4
Scholarships	3.9	–
Not stated	1.5	7

Source: Instituto de Estudios Fiscales. Document no. 10, 2001. Based upon the Family Consumption of Public Goods and Services Survey, for the year 2000. $N = 3,202$.

GRAPH 3.6: Distribution of households by household sources of income



Source: Instituto de Estudios Fiscales. Document no. 10, 2001.

Torres 2010). A number of reports promoted by the United Nations have served to establish a clear connection between the reduction in money transferred from developed countries suffering from the economic crisis and children and adolescents leaving school in less developed countries in order to enter the job market under precarious conditions. In those countries the decline in family incomes translates immediately into worse health care, and in deficient nutrition, and following the experience acquired in previous economic crises, that makes it possible to specify its impact as an increase in morbidity and mortality, particularly among infants and the elderly (Girón 2010: 43 et seqq.). Friedman and Schady estimate that as a consequence of the economic crisis, the number of people without adequate nutrition in 2009 increased by 100 million. In Africa alone it is calculated that between 30,000 and 50,000 children died, in the majority girls. In Latin America poverty had been declining continuously from 2002 to 2007 at an annual rate of 2%, but in the year 2008 the reduction was only 1.1%. The poverty rate grew by 3%, after achieving an annual decline of 1.4% over the preceding period (CEPAL 2009, 52; Eurostat 2009, 40)⁵⁴.

3.5.2. *Denos and the concept of unemployment*

The principal, and most serious, consequence of the economic crisis in Spain has been the increase in unemployment. Unemployment statistics use a classification of unemployment which has to be made explicit, because not every Table corresponds to a concept which is self-evident to non-specialists. The principal categories are as follows:

- a) *Job seekers*. This includes all those who have put their name on the unemployment register to seek help from the employment services to find work.
- b) *Job seekers in employment*. Those who have work, but are looking for something else which better meets their expectations.
- c) *Job seekers with limited availability*. Those who are looking for work on a part time basis or with some other limitation.

⁵⁴ International development aid, commonly known as ODA (Official Development Assistance), is 0.4% of gross national income in Europe, a far cry from the target of 0.7% proposed by the United Nations for the year 2007, and it has fallen since the year 2005.

- d) *Denos*. This is the abbreviation for *Job seekers without employment*, and they make up the largest category of the unemployed. This includes the registered unemployed and job seekers.
- e) *Registered unemployed*. These are the unemployed without work in the strictest meaning of the term, who have lost their previous job and have gone onto the employment register in order to look for another job.
- f) *Other non-employed job seekers*. Some classification systems consider these to be unemployed and others do not. They have not lost their job (for example, students, housewives), and therefore do not have unemployment benefit, but they are trying to find work and are not currently employed.

In addition, the statistics prepared by the registry do not make sufficiently visible three types of unemployment which may become very important in some productive structures and in some crisis circumstances, and which may be superimposed upon the categories described above. These are as follows:

- g) *The discouraged unemployed*. This is hidden unemployment, which does not become explicit or registered, because those who suffer from this lack the confidence to go out and find a job. It is tied to characteristics of the production structure (limited capacity to create employment), but also to some characteristics of the social structure, such as the de facto prohibition on certain types of work for reasons of class, gender, ethnicity, religion, or nationality, and also to the strength of the family ties in offering cover for members of the family who do not have employment.
- h) *Induced unemployed through the loss of family income*. Unemployment or the reduction of the income of one of the members of the family, especially those who provided the principal incomes, leads other members of the family to seek compensating employment, such as the spouse or adult children who are students.
- i) *The unemployed as a result of migratory pressures*. Migrations regulate unemployment in labour markets by means of push-pull factors. These are not automatic mechanisms, and the regula-

tion does not always take place efficiently from the point of view of sources and hosts. Imbalances, in particular when they are rapid and intense, may produce sharp changes in the labour market, and generate shortage of labour or unemployment.

The *employability index* measures the probability that a job seeker will find employment, if no changes occur in the labour market. Employability reduces as time spent unemployed increases, and to the extent that the job seeker puts restrictions on the type of employment or the place where they would accept employment, or if they are of an age approaching retirement or some other type of benefit (Toharia, Prudencio, and Pérez, 2006).

For the first time in recent history, in 2009 the flow of the unemployed abandoning the job market was in excess of the flow entering the job market, above all as a consequence of the discouragement effect among the unemployed (Banco de España, 2009b). The number of the working population fell by one hundred thousand people. Registration with Social Security fell by 6%, with a sharp contrast between the Public Administration (with no fall) and all remaining sectors. The trend to abandon the job market affected temporary workers, foreigners, the self-employed, and workers with a lower level of training with greater intensity.

In May 2011, the number of job seekers in Spain was in excess of five million, although almost one million of those are in employment and are trying to improve it (Table 3.20). The proportion of those with no employment (*denos*) among all job seekers was 79% for the total national Tables, more than one percentage point higher than in 2008, slightly higher for women than for men.

The Tables for job seekers in construction and industry are in retreat as these are sectors which are now badly damaged, but they are increasing in agriculture and in services. They are also declining for young people, although they are increasing among all other workers.

3.5.3. Households from the standpoint of the Bank of Spain

The images of the economic crisis are very heavily determined by the social agents which produce them and by those who can take

TABLE 3.20: **Job seekers**

	Total job seekers	In employment	Job seekers with limited availability	Denos				Percentage denos over job seekers
				Registered unemployed	Others not in employment*	Total denos	Year on Year Change**	
Total	5,625,048	960,548	220,755	4,189,659	254,086	4,443,745	2.55	79.00
Men	2,737,788	456,126	128,663	2,064,581	88,418	2,152,999	1.17	78.64
Women	2,887,260	504,422	92,092	2,125,078	165,668	2,290,746	3.88	79.34
Percentage of total job seekers	100.00	17.08	3.92	74.48	4.52	79.00	–	–

* The LFS considers these to be unemployed.

** compared to previous year same month.

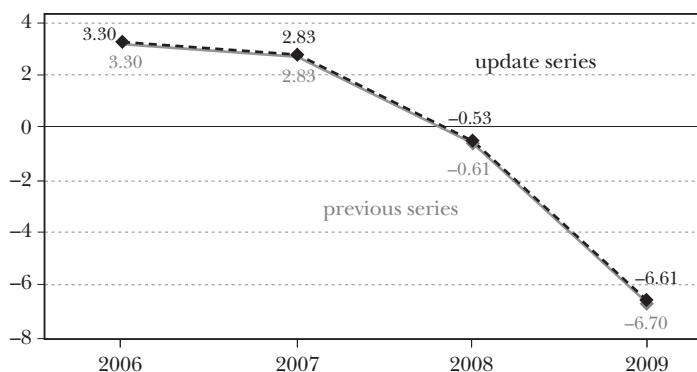
Source: Prepared by M.A. Durán using data from the Instituto Nacional de Empleo (National Employment Institute). Job Seekers Statistics (Estadísticas de Demanda de Empleo) (data for May 2011) (web site: sepes.es/estadisticas/demandasempleo/).

steps to have an impact on its development. Neither families nor households as such have a strong unified capacity for influence over the short term, and it is other institutions which project images of the role they play during the crisis, and of the role which they should be playing.

The central banks are those with principal responsibility for the financial policy in each territory, and in some countries (this is not the case in Spain) they are also responsible for drawing up the National Accounts. Their influence on the progress of the economy is great, and consequently, their power extends to sections of society which apparently have nothing to do with their area of activity. The view of the economy from the central banks' perspective is inevitably strongly influenced by the financial and credit forecasts, and households do not escape this general interpretative framework.

In the periodic reports which the Bank of Spain draws up on the Spanish economy, households commonly occupy a secondary place; nevertheless, they have gained in importance since the beginning of the financial crisis of 2007-2011, the worst suffered by the developed countries since 1929. The term *families* is employed more frequently than that of *households*. As is the case with virtually all economic research, the reports of the Bank of Spain take the greatest care to avoid being contaminated by emotion. If they refer to unemployment or to the hardening of the terms and conditions for obtaining credit, the reports rarely mention that workers at risk of unemployment suffer more psycho-somatic illnesses, or that internal conflict commonly increases in families where there is no income, or that young people who are unable to afford independent accommodation are forced to give up their aspirations of psycho-social maturity and extend the time they live with their parents, which is not always desired.

The capacity of households to acquire goods and services in the market depends in the main on their capacity to sell manpower. While in 2006 and in 2007, job creation grew at a rate of 3.30% and 2.83% respectively, in 2009 it contracted by 6.6% in full time equivalent jobs (Graph 3.7) Although the National Accounts do not touch upon this in its analysis, the growth of the years of expansion was achieved by importing immigrant manpower, and by the transfer of work from the non-remunerated sector to the remunerated

GRAPH 3.7: Full-time equivalent jobs

Source: "National Accounts of Spain. Update of the accounting series for 2006-2009", published in August 2010 (INE 2010).

sector. During the economic crisis, the remunerated sector has lost 6.61% of its jobs, and it has to be asked what proportion of this production capacity rejected by the labour market has emigrated, how much has been diverted to other occupations (for example, education, leisure, or to the full time search for a new job), how much has been applied to areas of the market which are invisible to the observation systems used by the National Accounts, and lastly, how much has been incorporated into the production of goods and services within households.

In the knowledge that no sources of statistics exist that could allow us to answer these questions systematically, and for such time as those sources do not exist, both researchers and those responsible for taking political decisions have to move within reasoned assumptions. Presented in this way, our assumption is that at least one quarter of the surplus labour in the market as a result of the crisis has not been sitting idle, but has gone into the domestic production of non-remunerated goods and services. This would have been even greater if the economic crisis had not principally affected the construction sector and its derivatives, in which the proportion of women has traditionally been low

The Bank of Spain continues to pay attention to the fluctuations in the labour market, which, from the point of view of households,

means the capacity to export resources into the economy outside the family. In the year 2009 it was found that the effect of the crisis was still imperceptible in the indicator of average remuneration per employee, which increased by 3.9% in comparison with the previous year. Nevertheless, the majority of the indicators were showing a seriously worsening situation for households: with respect to the sale of manpower to the market, the Bank found that employment had fallen by 7.2% on a year on year basis. Registration with Social Security fell by 5.3% year on year, and the number of unemployed persons registered in the State Public Employment Service (Servicio Público de Empleo Estatal - SEPE) increased by 35.1%. The increase in wage rates in the collective labour agreements registered between January and October was 2.6%, one point less than in the previous year. The only good news for households was the 0.7% drop in the Consumer Price Index. Both the reduction in income and uncertainty put downwards pressure on private consumption, which slid 4.9%. Investment in capital goods, housing, and other products declined by rates equal to or greater than 20%. The real index of retail sales (not including service stations), seasonally adjusted and corrected for calendar effects, fell by 2.8% year on year in the last month⁵⁵. The only indicator of consumption which improved was the change in automobile registrations, which improved as a result of the impetus of the Plan 2000 E in the private sales segment. Voluntarily and under pressure, households restricted credit for consumption; the reduction in the growth of credit for purchasing housing was spectacular, and after being at 13.9% in 2007 and 4.5% in 2008, it shrank to 0.35% in August/September 2009. Among the qualitative indicators, both consumer confidence and retailer confidence stabilised.

In 2010, households continued to experience difficulty in exporting their manpower to the market. In all types of household the proportion of members who were unemployed increased, and this was most acute in immigrant households. Nevertheless, productivity was exceptional: the cost per employee increased by 4.1%, but the cost per unit of product only increased by 0.7% (Banco de España, 2010a). In spite of the fall in income, households continued to re-

⁵⁵ The reference month is October 2009. The summary is by M.A. Durán.

duce their debt, by spending little and saving much, to the point that saving reached the record historic level of 18.7% of disposable income. The capacity of households to finance the external economy increased. The real property wealth of households continued to deteriorate, but their wealth in financial assets improved slightly.

The Bank of Spain points the finger excessively at households as a cause and/or explanation of the economic crisis: as they said explicitly in a 2009 report (Banco de España, 2009a), “the retreating GDP reflected the pronounced weakening of domestic demand, in particular in the case of families”. The Bank does not underline the role of the banking system as much, nor the organisational criteria of the Public Administration and the State, nor the inefficiency of companies, nor the low rate of technological innovation, but the households, whose lack of consumption contributes to the fall in the GDP.

For the year 2011, the situation of households did not change significantly. The negative movement in the labour market continued, property wealth declined, disposable income was in retreat, credit continued to be difficult to find, inflation went up, and in consequence, households did not contribute to increasing consumption and internal demand (Banco de España 2011).

It is paradoxical that households are presented as a problem when it is precisely the households which were making it possible to ride the economic storm, the development of which they contributed less to than any of the other economic agents, without social upheavals. After suffering a drastic loss in the value of their properties and of their income from employment, and after the consolidated savings of the households had become deconsolidated and partially evaporated: Could any other behaviour be expected than restricting consumption with a parallel increase in non-remunerated work to compensate for the drop in purchasing power? The reports of the Bank of Spain mentioned above discuss the destruction of paid jobs, but say nothing about the enormous increase in non-remunerated (and unwelcome) jobs which households had had to create urgently, thus finding work for a good part of the labour expelled from the labour market. Nor do they say anything about the jobs which have been converted — in many cases with the approval of the companies — into semi-jobs in the black economy. And as far

as non-resident transnational families are concerned, they are all but invisible in the Bank of Spain reports. Their purchasing power has been reduced by the forced contraction of the savings of immigrants in Spain, but in respect of these other families vitally connected to the Spanish economy, the report confines itself to the finding that there was “a fall in remittances” (Banco de España 2009a).

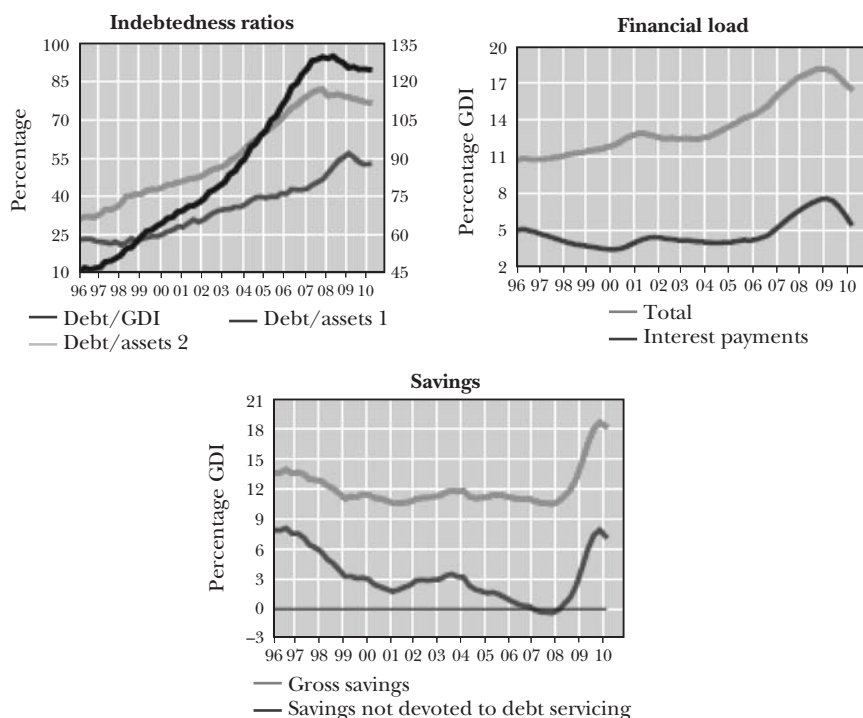
3.5.4. Material wealth and household debt

As is to be expected of an entity, one of the functions of which is to control credit, the Bank of Spain reports are relatively detailed in their analysis of changes in the wealth and loans of households, sometimes rather blurred by aggregating the data in respect of the NPISH.

During the long years of economic expansion prior to 2007, as a result of the rapid increase in real estate prices, households were obliged to take on a heavy debt burden in proportion to their gross disposable income (GDI) in order to purchase their homes. The ratio of indebtedness of households at the end of 2008 was equivalent to 125% of the GDI. The financial burden, that is to say, the interest at which they had to pay for the loans, was 18% of the GDI for the sector. In spite of the heavy financial burden, gross saving that year reached 2% of the GDI (Banco de España, 2009a, 71). This applies in particular to housing, a bubble which had been fed for years on the mirage of its own growth, and from which not only the households had profited, but also, and above all, the entire property and development sector, extending throughout all of its ramifications including the Public Administration (with income from permits and VAT), together with the other productive sectors. Faced with the economic crisis, households reacted by putting the brakes on their indebtedness, both from lack of confidence and difficulty in finding finance, and from the expectation that they would be able to refinance at lower prices in the future (Graph 3.8).

From the start of the economic crisis, households have been losing wealth. Not only have mixed incomes fallen because of the decline in profits, and employment income likewise because of the effects of unemployment; moreover their real property and financial wealth have also shrunk. *Real estate wealth* is the principal house-

GRAPH 3.8: Indebtedness, savings, and wealth of households, 2010
(percentage)



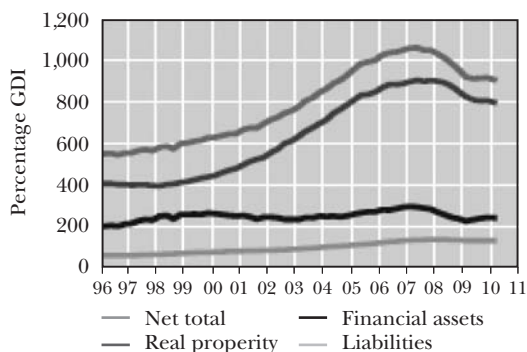
Assets 1 are financial assets minus the endorsement of “others”. Assets 2 are assets 1 minus shares minus participation in the International Monetary Fund.

Source: Banco de España 2010b (using data from the Ministry of Housing, National Institute of Statistics, and Bank of Spain).

hold asset in Spain, and consists principally of the ownership of the housing in which they live (85% of homes are owner-occupied) (Banco de España, 2009a, 53), and of other secondary housing which is not used to earn income. Unlike financial assets, being the owner of the principal dwelling is independent of class, and is distributed homogeneously throughout all social groups, although the value of the properties is not. Not all real estate is housing, and not all housing is owned by households, but the greater part is. The fall in the average value of real estate since the beginning of the economic crisis can be seen clearly in Tables 3.9 and 3.10, which show the rapid rise of property wealth from the year 1998, while financial wealth and debts continued a slow rate of growth. The wealth curve,

however stable financial debts and wealth may be, is almost parallel to the curve of the accumulation of real estate wealth⁵⁶. Graph 3.9 on the wealth of households, clearly shows the sharp and intense fall in property and financial wealth from the year 2007 onwards.

GRAPH 3.9: Wealth of households
(percentage)



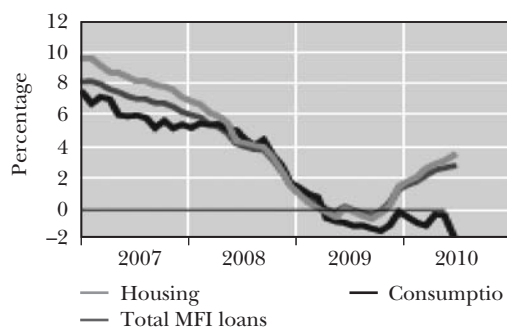
Source: Banco de España 2010b.

The loss of property wealth is not real, in the sense that no destruction or damage has occurred to the housing. It is only monetary, through the loss in market value; the value as a good in use has not changed, however much the value in exchange has, and to a certain degree it is the “bursting” of a “bubble” which had formed over the immediately preceding years. It directly affects households which are attempting to sell or let their assets, and those who are attempting to obtain loans based on the collateral value (Graph 3.10).

The fall in the market price of housing has brought with it a number of intergenerational effects which are worthy of mention. For persons of advanced age, in the majority owners and with their housing completely paid for, the fall in prices affects — and this is not a mere petty detail — those who were counting on the value of their home as collateral for an annuity through a reverse mortgage, *in vivo* donation to their carers in payment for their care, or other

⁵⁶ The estimate made by the Bank of Spain is based upon the estimated development of the housing stock, the average floor area, and the price per square metre.

GRAPH 3.10: Loans to households. Year on year change rates
(percentage)



Source: Banco de España 2010b.

similar formulas. Groups of the middle aged who have not been obliged to sell their homes in order to pay off debts have not been overly affected by the property economic crisis, and the fall in interest rates has benefited people who have outstanding mortgages, although this expense may not have the same pre-eminence in their budgets as it does for younger groups. For young people who were making a political issue out of the high prices of property until the crisis began the problem has moved to the background in view of the omnipresent problem of unemployment (40% unemployment among young people) and the precarious nature of jobs. The preference for ownership is giving way, at least temporarily and on a strategic level, to a preference for renting. The effect of the crisis on the lowering of prices which could have favoured young people as potential purchasers has been more than neutralised by the fragility of employment and the worsening conditions for obtaining bank loans. Some groups have been particularly hard hit by the combination of the general economic crisis and the construction crisis; these are the people who were already committed to the purchase of co-operative housing where construction has still not begun. In view of the poor forecasts for unsubsidised housing, organisations are not planning mixed projects of unsubsidised and subsidised housing, the latter generally promoted as cooperative projects. The houses are not being built, and the members of the cooperatives cannot leave the projects in order to recover the money already invested.

Lack of access to housing is a contributory cause of a delay in young people getting married and of the falling birth rate.

With respect to financial wealth, the principal effect of the crisis on households has been a reduction in the market value of their securities⁵⁷ and the demobilisation (sale) of their assets in order to keep up with daily consumption and to pay off loans. The financial wealth of households partially recovered towards the end of 2009 with the increase in stock market prices, but they then receded again. One of the social groups most prejudiced by the fall in the value of assets comprises people of a fairly advanced age who are the owners of equity pension funds. This is a very numerous and relatively classless group, because such investment was heavily supported by taxation policies up until 2007.

In 2009, households paid interest at a rate of 7.9%, or 4.4% in the case of housing loans, with a downward trend in paying for the consumer loans which they received from banking institutions⁵⁸. The problem with loans was not principally the price, but the difficulty in finding a loan because of the increase in collateral which the financial institutions are now demanding.

Although not as well-known as bank loans, “interfamily networks” play a very important financial role in the credit system, in particular in respect of loans which are not mortgage backed. These are prior loans and complementary loans, and not alternatives to those from the banking system. In a recent survey, the CIS showed that a majority of people consider that, in order to resolve a short-term situation of financial difficulty, people ought to go to their family to get a loan before asking the bank (CIS 2010b). 49% of those interviewed held this opinion, while only 32.4% considered that it is preferable to go straight to the bank. This is regardless of the fact that only 13% think that they would, if necessary, have some family member to whom they could go to for a loan if they were to need one. Without it being a question of a more formalised loan (a loan which has to be paid back), 12.5% of men and 13.4% of women acknowledge that over recent months they have received finan-

⁵⁷ In December 2007, the IBEX stock market index reached 16,000 points, and in October 2008 it even fell below 9,000.

⁵⁸ This refers to the 1st Quarter of 2009.

cial help from one family member or another. The proportions are greater among young people: 30% of people younger than 25 years of age and 23% of people aged between 25 and 34 years of age say that they have received some type of financial help from members of their family. On the other hand, only 3.6% of those over the age of 65 years old state that they have received financial help from any of the members of their family.

3.5.5. Household savings and their contribution to capital formation

With the beginning of the crisis and the collapse of the property sector, households reduced their appetite for and their capacity to purchase housing. They have no confidence in being able to meet their commitments to pay debts already contracted, and have had to limit their consumption of non-essential goods, or which had not been committed to previously. In very few months, households have been put through a tough process of adjustment: at the same time as their incomes have been reducing, they have been saving. While their saving rate had been negative during the years of expansion, this has become positive with the economic crisis. Under any circumstances, the change in trend is an abstraction which refers to households as a whole, because many households are unable to follow it. A few households, prefer to continue to run up debts, and believe that the crisis brings with it the best moment to invest, taking advantage of low prices and the fall in interest rates. The majority of households have reduced their expenses below the level of their income as a precaution against possible lay-offs or losses in their own businesses. These are the households which are contributing, with greater difficulty and modest results, to generate national savings. Finally, a small group of households is incapable of paying off the debts they have incurred: 5.2% of defaulters in consumer loans, and 2.4% in housing loans⁵⁹.

The macro-econometric model of the Bank of Spain (MTBE) only explains half of the saving produced between 2007 and the second quarter of 2009, and therefore it has to be asked what resources do households use which have not been accounted for in

⁵⁹ Referring to December 2008.

the econometric model, and what role in replacing goods, and especially services, was played by non-remunerated work within households in generating savings (Banco de España 2009c, 58).

In 2010 and 2011, the situation has not changed significantly⁶⁰. Employment has continued to shrink, although at a slower rate, and unemployment reached a figure of 4.4 million in the first quarter of 2011, which is 21.29% of the working population, hitting foreign workers and young people particularly hard. Temporary part-time work has increased together with all forms of job insecurity. The working population has remained at the same level, with slight fluctuations, in spite of the poor prospects of finding employment.

The Government has been more optimistic about their forecasts of the end of the crisis than all other Spanish and international bodies. With respect to the way in which public opinion perceives the economic situation, the CIS barometer for April 2011 found 40% of those interviewed believed that the situation was bad and 38.4% very bad. 57% believed that it was worse than the year before. Among expectations for the year ahead, those who believed that things would worsen (29%) exceeded the number who thought they would get better (18%).

During 2010 and 2011, forecasts were adjusted downwards by the OECD and other bodies, in particular those referring to job creation. Although in some respects the recession appears to have hit bottom, the beginning of the end of the crisis is still not expected, and it will take several years for the level of employment to recover levels seen in 2007; this will be difficult to achieve if the productive structures which deprive Spain of competitive capacity in the international environment are not transformed. The tourism and hotel sector will experience difficulty in producing added value in competition with other tourist destinations which are cheaper and more innovative, although in 2011 part of the competition in tourism was watered down because of the insecurity in North Africa. With respect to construction, internal demand will not be able to absorb the high volume of housing and buildings already built.

If the market is unable to generate employment, households are left with no alternative but to increase the production of goods and

⁶⁰ The most recently available when this was submitted for publication.

services by means of intensive use of non-remunerated work, providing those affected by unemployment and lost wealth with a network for social and financial protection which neither the market nor the State are capable of guaranteeing.

3.5.6. When will we come to the end of the crisis? Its impact upon the formation and break-up of households

The economic crisis has extended its consequences to such important features of everyday life as the formation and breakup of households and the arrival of new children. According to the INE (Statistics on Annulments, Separations, and Divorces 2009), during the period of the economic crisis there has occurred:

- A fall in the number of divorces and separations (a fall of 10.7% in 2009 with respect to 2008).
- A fall in the number of children. Between 2008 and 2009 the number of births decreased by 5%: the first time this Table has fallen in a decade. The number of births to non-Spanish mothers also decreased by 6%.
- A decline in the total number of marriages (11%), although accompanied by a slight increase in the number of civil marriages (they grew by 0.6%).
- A slowing down in the arrival of new immigrants, and a moderate number of those already settled in Spain returning home, which does not balance out the new arrivals⁶¹.

The data on the decline in divorces, separations, and annulments has to be interpreted in terms of the economic incapacity of families to afford the costs of the break up and the establishment of separate lives in different homes^{62,63}, but this does not necessarily mean that this has fostered a climate of understanding, collabora-

⁶¹ INE, Local Resident Population Census (Padrón), 1 January 2010. The number of registered resident foreigners increased by 1.1% in 2009 in comparison with 2008. Non-EU foreigners fell by 13,020 personas, to reach a figure of 3,362,425.

⁶² In more than half of divorces the court ordered that alimony should be paid, and this was complied with by the husband in nine out of ten cases.

⁶³ The fall in the budget for ceremonies not only affected the number of marriages, but also the extent to which they were celebrated. In 2008, the average number of guests was 138, and this fell to 90 in 2009 (Guiadenovios.com 30/10/2010).

tion, and satisfaction with family life. This has prejudiced young people in particular, delaying their joining the labour market, and in consequence prolonging their dependence upon their parents in their place of origin. In many households, the loss of jobs among the intermediate generation has altered power relationships, and has given a more favourable position to retired people who enjoy income. It has also altered the relationship of dependency between spouses, and for the first time in recent history the unemployment rate among men has closed the gap with the rate for women.

The role of non-remunerated work has taken on enormous importance in the face of falling income. Services which in former expansive times were being transferred to the market have to a great extent gone back to being produced within households. The crisis has also reduced the resources of the Public Administration, and the subsidies and services which they offer free of charge or in a subsidised format to the population at all levels: the local level, the autonomous regional level, and the State level.

The loss of employment translates not only into a loss of money, but also into anxiety, a loss of social rights and representation, loss of social respectability, and the redistribution of family power relationships: between parents and children and between spouses, with a snowball effect which affects both formal employment and that in the black economy. The loss of capacity to find work is in some cases mitigated by prolonging the period of education. In many households, grandparents and other pensioners have gained importance because their modest incomes remain stable and regular, while those of others are crumbling.

4. The content of non-remunerated work

4.1. Freedom, necessity, and coercion in non-remunerated work

Freedom is the capacity to choose, to do, or not to do. In remunerated work, the law protects the freedom of workers explicitly, guaranteeing, among other things — barring a few exceptions — collective negotiation and the right to strike. However, freedom in remunerated work is relative, because employment is the only manner which the majority of the population has available to achieve the resources which are indispensable for survival. That is why freedom is limited to “not having a specific job imposed” on a person, or to certain specific working conditions. The background to this freedom is the duty to work and the right to work, which in practice is defined by the right to certain social benefits for workers who have lost their employment.

Although the majority of the population needs a job in order to survive, the variations between societies and periods are colossal. For instance, there is a massive gulf between the proportion of the working population in comparison with the potential working population in the countries of the former Soviet Union and in Central Africa. This shows that the margin of variation in the forms of social organisation is extraordinary. With respect to the need to work, this is a quality which the labour market does not take into consideration. Necessary, useful, or superfluous are not categories which are important to the market, where the fundamental criterion is that the product, whatever it may be, should be bought and sold. When a society

“prizes” an activity and demands it from the market and pays for it, it is considered to be *productive* even if it is harmful.

If the categories of freedom and need are applied to non-remunerated work, the situation is quite different from the case of employment. Many non-remunerated activities are considered to be necessary, and are performed precisely because they are considered to be so, although they are not rewarded with any type of compensation. From a social and political perspective, the debate is not so much about whether they are necessary, although that is also part of it, as about “who has to take responsibility for them” and “*the reasons for doing it*” (Garrido 2000, 551-568). Care and self-care are the most debated activities, but in turn they embrace almost any other domestic activity. Cleaning, cooking, shopping, running errands, accompanying, transporting, keeping an eye on, representing, administering are all tasks which may be considered to form a part of care, in particular when it is applied to third parties.

The limit between work and leisure is not clear in any type of work, but in paid work there are elements which have nothing to do with this criterion, such as the time and the place, which make it easy to delimit the boundaries: *work* is what happens “at the place” of employment and within the agreed “working hours”. This marker of separation does not exist in self-employment, and the delimiting boundary is unclear. In every activity there is a spectrum between what is strictly indispensable (the “sufficient condition”) and technical excellence. Where does need end and enjoyment begin, the prolongation of the job just for the personal satisfaction of improving its quality? Where does the limit lie between “necessary” repetitive work and “unnecessary” but creative work, that of the search for new solutions even at the risk of not finding them, or of making a mistake?

Coercion appears at work in many guises. The most obvious form is *slavery*, forced labour under threat of physical punishment. But this type of coercion is only one end of a continuum in which there is an infinite number of levels and variants, including forms of punishment which run from the loss of the means of subsistence to the withdrawal of alternatives, emotional threats, and moral pressure.

In the cruder forms of coercion, the worker can see them clearly, as he can see the agents which impose them, and it is therefore easy

to identify it as external and to direct individual or collective action towards eliminating it. On the other hand, in subtle forms of coercion, the externality is scarcely visible because its effectiveness consists specifically in ensuring that the worker internalises it, feels it to be a personal decision and not a decision by some other; furthermore, in order to be effective it is indispensable that the worker should interpret it in individualistic terms, in order to prevent him or her from engaging in structural analysis or in collective action. In this respect, the unveiling of the coercion and its reinterpretation as a matter which does not depend purely on the actors directly involved is the first and indispensable condition for eliminating it.

Non-remunerated work in the home has traditionally been interpreted as an obligation to which the individual has had to submit on the basis of belonging to a group constructed in social terms on sex-based criteria. This is what the administrative language of Spain called “the obligations appropriate to her gender” until the end of the 20th century, or as abbreviated in the simplified form for the national identity document “S.L.” (i.e., in Spanish, “sus labores” — her tasks); a concept which nowadays fits into another, wider, interpretative context: gender relationships. As part of the implicit social contract which controls the division of labour between men and women, there are also “obligations appropriate to their gender” which fall principally on the men, such as physical defence and the provision of financial resources. While both men and women accepted the sexual division of labour as something natural, minor conflict was generated; its effectiveness was reinforced by all of the resources that a society is capable of generating, such as education, law, ethics, and aesthetics. Although still strong and with a powerful capacity for coercion, the model for the division of tasks between men and women has begun to crack, and is incompatible with an individualistic industrial society, the belief in the value of equality, universal access to education, and above all the lengthening of life expectancy and the reduction in the proportional time devoted to motherhood in the life cycle. Social support for the idea that women “must” give their time and their lives to the care of their families is becoming more and more restricted. Rejection of care-giving as a natural moral obligation which only affects women is becoming more and more frequent, and by the same token, the idea that it is

a collective expropriation which occurs outside the household, but which finds its expression within the household as its daily materialisation, is becoming more and more widespread.

In Spain, the preference for the model of the egalitarian twin-career family has become thoroughly established. According to a recent study by the CIS, this is preferred by more than two thirds of the population (67.6%) while only a 14.7% express preference for a model of strict division of work within the family, in which only one member of the couple is engaged in paid work while the other is in charge of the home (CIS 2010b). Among young people, these figures reach 76.6% and 7.1% respectively, a preference which is quite distant from that of those over the age of 65 years old, among whom, however, the strict division of labour model by gender is also a minority-held view (44.4% and 30.8%), in favour of the egalitarian model. Contrary to what might be expected, the opinions expressed about this topic by men and women are similar, although men are somewhat more in favour of the traditional model (17.1%) than women (12.4%).

The preference for the model is rhetorical, and is expressed on the assumption of it being possible. If it were not and one of the members of the couple had to do less paid work in order to take care of the home and children, similar positions are held by men and women; both the men (46.6%) and the women (44.9%) believe that it should be the woman who should reduce their paid work, although more than half proposed alternative formulas, such as distributing it without differentiation (21%), that the one who had the worse paid employment should take care of the home (10%), or that it should be decided by reference to other criteria.

All of the available data confirm that the egalitarian model for the division of labour is a rhetorical one: in the same survey, 64% of women, as opposed to 16% of men, said that they were the ones who were principally responsible for the most important domestic chores in their homes. However, the fact that they took responsibility for the chores does not mean that they identified themselves with the chores in terms of employment. Only one quarter of the men who lived in a couple said that the occupation of their partner was the domestic chores, which is equivalent to saying that the remaining three quarters identified their partner with a different job or socio-

economic status. This is a piece of data which demonstrates the change which has occurred in comparison with a few decades ago, but it loses a lot of meaning when it is remembered that only 0.8% of women living in a couple said that the principal occupation of their partner was the domestic chores. There continues to be a wide gap between the models which are supported publicly, expectations, and everyday reality.

4.2. The selection of the units of analysis: work, workers, households

No unanimous definition of non-remunerated work exists, and the first objective of this research is to explore the limits of the concept in order to make them more visible and to facilitate the adoption of agreed criteria in respect of the use of the term by researchers and political and economic decision makers. The criterion for *non-remunerated* work is relatively easy to determine if we are to take the term to mean “work not exchanged directly in the labour market for money”. Nevertheless, as will be seen in detail over the following pages, the criterion of remuneration is not always clearly recognisable, not even in respect of employment. There exist degrees in employment depending on the certainty of receiving remuneration, its frequency, the amount, and the inherent social and economic rights. This is a spectrum of variation which extends from wage-earners at one end along a continuum to the remainder of the working population, such as workers working on a project basis, by commission, the self-employed, employers, family workers, informal workers, the unemployed, and those in a situation of being temporarily out of work. Nor is it easy to distinguish the status of non-remuneration outside employment. If they were unable to satisfy their fundamental needs, those who perform non-remunerated work would die, and so in some manner or other they are compensated for doing their work. In the same way as for remunerated work, there exist degrees in non-remunerated work which include situations approaching slavery in which coercion and expropriation of the capacity to work predominate, to more common situations in which there is in fact some indirect compensation for the work by means of participating in the

ownership and enjoyment of the capital and the income of the family unit to which the work is devoted.

Operationally speaking, *non-remunerated work* may be defined as “the time devoted to effort applied to the maintenance and transformation of the environment”. This makes no reference to payment or remuneration, specifically in order to differentiate it from employment, and environment should be understood to mean both the physical and the social environment. The reference to effort is included in order to underline that this is an activity which consumes resources, both in attention and in physical activity.

The choice of a unit of analysis is made by intellectual preference and by the availability of sources. In this study the preferred unit of analysis is non-remunerated work regardless of who performs it, but the availability of sources, or rather the lack of availability of sources, has meant that other units of analysis are used almost equally frequently, such as workers and households. Moreover, due to the constant interaction and relationships of substitution between remunerated work and non-remunerated work, workers tied to employment and companies have also received special attention.

The choice of work as the preferred unit is due to an explicit strategy of depersonalising the activity in order to underline its objective nature, equating it to traded goods. The reasons for doing so are the opposite of what might be expected; specifically because the greater part of non-remunerated work is performed by women and historically this has been interpreted as an inherent obligation in being female, natural and consequently not susceptible to change; it is a question of breaking the bond between non-remunerated work and the person who carries it out. In other words, the analysis has been situated at an intermediate point, abstracting — here and now — the determinants of a more general nature which have constructed non-remunerated work as we know it today. With an eye to the future and an innovative distribution of work, we have opted to treat non-remunerated work in the most “transferable” manner possible, specifically to stimulate thought about alternative forms of distribution between various different social institutions, between peer groups, and between men and women.

Other reasons, of a strictly methodological nature, have also contributed to this decision. While in remunerated work, the work-

ers are in the majority full time and identify themselves, and are identified by society, by the roles which they carry out in respect of their employment, in non-remunerated work there is an abundance of part-time workers or those who combine it with remunerated work, and only a minority of those who devote their efforts to this type of work identify themselves and are identified by society by their work. In short, the status of being a non-remunerated worker does not generate social identity or statistical information, and it is a category which is even more difficult to operationalise than that of non-remunerated work itself, which is already difficult enough.

With respect to households, using them as a unit of analysis is demanded by the productive structure and even more so by the availability of sources. *Households* are units of production of goods and services, in the same way as companies are. Their resources not only come from the ownership of assets, from the receipt of State social benefits, or from the resources earned by those living in the household who export their remunerated work to the monetarised economy, but also from the contribution of non-remunerated work.

Conceptually, it is essential to make a clear separation between households and families: households, as has already been indicated, are units of shared daily life. The facilities of households (fittings, tools, and infrastructure) and their size and internal organisation provide the basic framework for the conditions in which the greater part of the non-remunerated work throughout the world is carried out, and that is the reason why they are given constant attention in this research. *Families* are networks of emotional relationships in which the territorial framework extends beyond the household. On many occasions, although not always, networks of emotional relationships overlap the networks of exchange or donation of non-remunerated work. And that is why in some cases extensive family networks have been used as units of analysis.

4.3. Recipients and consumers of non-remunerated work

For methodological purposes, it is necessary to distinguish between work done for oneself, for other members of the household, and for

family members and/or friends who live in other households. Work done for oneself is work, in just the same way as the work done by a farmer who consumes his animals, or a mechanic who repairs his own car is work. Work done for oneself holds a particular conceptual and economic importance in developed societies in which one third of households are single person households. Work performed for other members of the household is the non-remunerated work which gives rise to the least argument and fewest problems of identification; it varies noticeably in content depending on whether the society is one in which small-sized nuclear households or large-sized multinuclear households predominate. Work done for other family members or friends who do not share the same home is also work, although certain statistical indications make it difficult to recognise as such. The viewpoint of individualistic societies cannot fail to recognise the existence of family-orientated societies in which this type of work continues to fulfil an important role, both in the activities of everyday life and, above all, in dealing with exceptional circumstances.

From a conceptual point of view, the separation between what is work and what is not in household chores is difficult and stimulating at the same time. The criterion of direct remuneration is of no use in the definition, given that all of the activities are non-remunerated. Nor is the criterion of effort. The criterion of the recipient (whether for oneself or for third parties) may be useful on some occasions, but it does not always clarify the classification of any activity as work; if carried to extremes, it would mean that in single-person households there is no such thing as domestic work. The criterion of the "third party", on the other hand, i.e. if the activity could be carried out by a paid third party, is the criterion which is most used by analysts, but it too fails to resolve the matter fully. In the Spanish language, there are many action verbs (to comb, to dress, to wash) which become reflexives (to comb <your hair>, to dress <oneself>, to wash <oneself>) in order to exemplify the variability of the action; in fact, any of these three activities, without having to refer to distant cultures or historical periods, is, under certain special circumstances (sickness, social events, galas), transferred to paid professionals (butlers). Management activity (purchases, dealing with institutions, representation) take up time, and are of considerable economic importance, but neither their theoretical nor legal

status, nor their status in financial accounting, are clear. Sometimes they are considered to represent productive activity (in the purchasing departments of every company), and at other times a mere domestic obligation, or even a privilege or a hobby of high social prestige, depending upon the type of purchase and who performs it (Durán 2000b, 455-506).

The most difficult activities to separate out are those which are habitually accompanied by a high emotional content, and which therefore are far removed from remunerated work; for example, leisure and sexual relations. When these activities are performed freely and for pleasure or out of conviction, they cannot be classified as work: the question, therefore, is precisely to what extent are they carried out for those reasons, or due wholly or partially to distinct motives and reasons which would bring them into line with remunerated work or obligated work. There is no doubt that sexual relations can be classified as work, and the fact is that prostitution constitutes a major sector which is included in the National Accounting, and moves huge sums of money, giving rise to legal regulations and polemic among the general public, both because of the sexual activity itself and because of the context in which they are immersed. Even activities which provide company without sexual relations sometimes become work. The *escort* or *geisha* have popularised the two examples as particular forms of work which the majority of the population have not experienced through direct contact, but with which they are familiar through literature, the cinema, and the media. Another diffuse conceptual boundary which involves women in particular, is that of "self-maintenance": activities which are intended to improve their physical appearance. In professions connected to public relations, it is not uncommon for employers to recognise that part of the time devoted to this activity is work, and a budget or an increase in pay is assigned in order to compensate for the expenses this gives rise to. To what extent is attention to developing one's own beauty or appearance optional and to what extent is it obligatory? (Durán 1988, 47-50).

Quite apart from any commercial considerations, leisure time shared within the family or on a more restricted level still, between couples, is time which is distorted in quantity and content by social considerations. Every age and every society establishes the frame-

work for company and leisure to be distributed in one way or another, with certain people or with others. Table 4.1 shows the time devoted to leisure in the presence of the partner in the United States in 1965, 1975, and 2003, using data from the American Heritage Time Use Study (AHTUS). The changes are due to the fact that the make-up of family groups and the activities of their members have changed over the course of the period. Couples are nowadays more intimate, they spend more time together, and do more activities together. For some social groups, such as those with a higher level of education, the time devoted to social activities within the home and in the presence of the partner has increased in comparison with forty years ago (Voorpostel, Gershuny, and Van der Lippe 2007). Nevertheless, in some social groups and in some occupations, the boundary between work and public relations is so tenuous that spouses are obliged to devote their time to the tasks of representing the institution for which their spouse works.

4.4. The contribution of Time Use Surveys to our knowledge of the basic tasks in the home

Time use surveys are, for the moment, the best instrument available for understanding non-remunerated work, and statistical organisations (Eurostat and others) and research associations such as IATUR and others have made a decisive contribution to this knowledge

TABLE 4.1: Proportion of time devoted in the presence of the partner in 1965, 1975, and 2003 for five groups of leisure activities, United States

	1965	1975	2003
Sports and cultural activities	0.55	0.65	0.71
Restaurants, bars, parties, etc.	0.47	0.45	0.70
Social activities at home	0.40	0.50	0.66
Art, pastimes, and hobbies	0.19	0.24	0.24
TV, radio, music	0.68	0.69	0.66

Source: Voorpostel, Gershuny, and Van der Lippe (2007).

(Durán 1997, 2010a; Durán and Rogero 2009; Eurostat 2005). These surveys are not without their difficulties; the first is the lack of regular comparable surveys throughout the world, and the second is the underestimation of the time devoted to caring, which has arisen through lack of attention to simultaneous or secondary activities⁶⁴. Starting in 1995, with the proposal of the United Nations (Beijing Conference) for innovation in the SNA, many countries have carried out one or more monographic surveys on the use of time, particularly in the developed countries of the OECD. Time use surveys provide three principal types of information:

- 1) On the manner in which each person interviewed uses their individual time;
- 2) On the context of each activity (where, with whom, for whom, in exchange for what, etc.);
- 3) The use of time and the characteristics of the household in which the person interviewed lives.

Over the last decade, an enormous advance has been made in this field in Latin America using various different methods, principally specialist modules within regular household surveys (Durán and Milosavljevic 2012). The majority of developing countries do not have surveys, or have only one (India, Thailand, Mongolia, Laos, Benin, Madagascar, South Africa, Morocco, and Brazil) (Hirway 2005b, 13)⁶⁵.

Time use surveys are still under-implemented in Africa, and consequently the satellite accounts of domestic production or of non-remunerated work are similarly under-implemented. The NSAHP (National Satellite Accounts of Household Production) in South Africa was the first of this type, based upon the time use survey of the year 2000. This was an account in a basic format, which will have to be expanded in the future. It is also foreseeable that new satellite accounts will be produced, when the surveys on the use of time

⁶⁴ The problem of the marginalisation of the so-called “secondary activities” has been highlighted by many authors (Chakraborty 2005).

⁶⁵ Other authors extend the list to Nigeria, Mauritius, Tunisia, Ghana, Guinea, and Senegal because they include the modules in other surveys and in the activities surveys (Charmes 2005, 2).

completed or in progress in six African countries provide the essential information (Latigo and Neijwa 2005, 10).

From the analysis of time use surveys it can be seen that the differentiation of non-remunerated domestic work by gender begins very early, with girls devoting twice as much time to household chores as boys of the same age. It can also be seen how little time all young people devote to this activity while they live at home with their parents, something which Bittman and Pixley label as “a certain kind of slavery for the parents with respect to their children”. When they become emancipated, either when they live alone or when they share accommodation with people from outside their families, the domestic workload increases considerably, doubling for women and even more in the case of men (Bittman and Pixley 1997, 103).

In India, the Central Statistical Organisation carried out a time use survey of 18,591 households in six large States in 1999, which has made it possible to understand non-remunerated work in the country, in particular that carried out by women and children. Chakraborty proposes a special kind of *cost benefit analysis* (BIA, Benefit Incidence Analysis) in order to identify the relationship between the cost of public investment and the ratios of individual use of the public services generated, by geographical regions, income quintiles, and gender (Chakraborty 2005, 17). The difficulty in reflecting the real economic structure in the accounting system in India has been highlighted by a large number of writers, in spite of the statistical advance achieved by means of the censuses and the time use surveys. The effort expended by public policies in order to increase the weight of the market in the economy has affected the distribution of time for men and women differently, favouring remunerated work and penalising the kinds of work in which women have traditionally been involved (Rajivan 1999, 9; Pandey 1999). According to the Time Use Survey 1998-1999, men devote an average of 3.65 hours per week and women 34.63 to the activities in the extended SNA (household maintenance, caring for children and the elderly, and community work) (Gupta 2007, 10). Work in the informal economy, in the subsistence economy, in domestic chores, and in voluntary work is very poorly reflected in the labour statistics. As I. Hirway indicates, programmes for bringing women into the working world will not be successful, and consequently nor will programmes aimed at the political integra-

tion of women, if governments do not manage “to reduce the workload of activities within the extended SNA performed by women, by ensuring that fuel, water, and feed for the animals is available at the home, by providing institutional care for the children, and by establishing policies to reduce the strength of the patriarchal system in the country” (Hirway 1999, 17). Child labour is a similar case, poorly accounted for but widely extended; for example, their contribution to the search for firewood and other sources of energy for the home is one of the principal causes of truancy or even of abandoning the school system altogether. The value of non-remunerated work has been estimated as being between 20 and 34% of GDP, depending on the region (Kulshreshtha and Singh 1999). In some rural districts, women devote a quarter of an hour to remunerated work to every three and a half hours of non-remunerated work (Pandey 1999, 4).

In China, the results of a survey carried out by the National Statistics Office in 2005 show an unbalanced distribution of time between men and women, together with an imbalance between rural and urban areas. 85% of women devote some time every day to non-remunerated domestic work. 59% of urban men devote some of their time, and 47% of rural men. On average, women devote almost three hours every day to it, and men only one hour and ten minutes. Urban women devote 3 hours and 11 minutes and rural women 2 hours and 44 minutes to it. Overall, the average working day in remunerated and non-remunerated work for women is 9 hours, almost half an hour more than for men. For both rural and urban women the principal domestic work consists of the preparation of meals and cleaning the home. As for the third most important chore, rural women highlight washing clothes and maintenance of the home, while urban women indicate shopping (Xin Li 2006). Other prior studies found the working day of the women in rural areas to be 15 hours, and the contribution of women to GDP to be 47% when “non-market” activities are included in the calculation (IFAD 1995). Seasonal variations are considerable in the rural areas, where the rhythm of work is not determined by working days and holidays but by the needs of agricultural production. Because of the migration of the men to the cities, agriculture has become a female occupation, and this has made the role of the women of mature or advanced age more important (Hongqin 2009).

4.5. The preparation of food

The preparation of food is an economic activity pervaded with cultural determinants and social rules, which go beyond the merely nutritional aspects (Durán 2010b, 65-88).

In under-developed countries, where monetary resources are very scarce, the relative value of the time applied to the food-providing function is of the greatest importance. Drinking water is an essential item, coming before and with equal importance to foodstuffs, and obtaining it consumes a great amount of working time. According to the Population Reference Bureau, 18% of the overall population is undernourished in under-developed countries: this proportion reaches 35% in the least developed countries. In some sub-Saharan countries the proportion of people who consume fewer calories than are necessary every day reaches a level of 60%. To give a comparison between two types of societies, in Italy or the United States, the percentage of under nourished people does not come to 2.5%, while in the Democratic Republic of the Congo, the figure is 74%. In Italy, the population will only increase by 2 million people (0.3%) between 2010 and 2050. On the other hand, the population will increase by 122 million people (182%) in the Congo, which means that the need for accessible foodstuffs will be even greater than now (PRB 2009a, 2).

A large proportion of the food is produced and, above all, is processed, in the households, without going through the market. The task of obtaining foodstuffs, storing them, cooking them, and offering them to the members of the household every day is one of the tasks which consumes the greatest amount of non-remunerated work, both in terms of the time consumed in the preparation of each meal and in terms of the number of times which it has to be carried out every day. In some rural areas, women with limited resources devote twice as much time as the rest in preparing food, because of the time spent in collecting firewood, milling the grain, and looking after the fire (Orozco 2005, 7-9)⁶⁶. The use of non-remunerated work converts raw food materials, which cannot be as-

⁶⁶ According to this study, having certain electrical home appliances is considered to save seven hours of work every week: three hours for the electric cooker, three for the microwave, and one for the refrigerator.

simulated, into true foodstuffs, and makes it possible to satisfy nutritional needs at a cost which is affordable for households.

In the developed countries, the work involved in feeding oneself and others can be observed from a certain distance, because part of the work has been transferred from the households to the formal market, and this function only consumes a relatively small part of the monetary household resources (Calatrava and Melero 2000, 125-202). In Spain, for example, in 2008 households only spent 14.5% of their budget on buying foodstuffs, while they devoted 9.63% to hotels, cafés, and restaurants, 13.68% on transport, and 27.23% on housing. Even in the group with the lowest incomes, spending on foodstuffs did not come to 19% of the overall expenses, although it was proportionately twice as much as in the highest group, where it did not even reach 10% (Family Budget Survey 2008). The function of offering food to the members of the household has in large part been transferred outside the household, in particular for those who are in work and live in urban areas⁶⁷. Certain sources (Federation of Independent Consumers - FOICI)⁶⁸ estimate that on working days 60% of the urban employed population eat outside home at midday; of those 15% take food from home, while 80% eat a set meal and the remainder eat à la carte. Other sources estimate that the percentage of children who eat at their schools at midday is 21%⁶⁹, a figure which rises to 42% in the case of primary schoolchildren⁷⁰, and even up to 70% in some areas of the Mediterranean coast⁷¹.

Although this is not the only reason, the lack of time to prepare and consume healthy food is a contributory factor to the current

⁶⁷ Chamber of Commerce, Madrid, 2 October 2009. The results of a consumption survey suggest that the habit of eating away from the home is increasing in comparison with previous years.

⁶⁸ (Federation of Independent Consumers). This is based upon a survey of people in employment and resident in cities carried out in the year 2007 on 2,800 people in fourteen cities. The average cost of these meals per person per month was € 200.

⁶⁹ *Eroski Consumer*, 28 May 2009, using data provided by the Ministry of Education.

⁷⁰ *Eroski Consumer*, 12 October 2004. For primary and secondary schools, the estimates are lower. The average number of days the dining halls are used was 165 days per year.

⁷¹ Tema del Día (elperiodicomediterraneo.com), Castellón. The percentage is lower in areas in the interior because the mothers of schoolchildren are not in the employment market.

TABLE 4.2: Expenditure on eating away from home
(percentage with respect to total expenditure)

	Percentage distribution
11.111 Set menu in restaurants	0.74
11.112 Lunches and dinners in restaurants	2.53
11.113 Consumption in bars and cafes	4.49
11.114 Consumption in pubs and discotheques	0.23
11.115 Banquets, ceremonies, and celebrations away from home	0.49
11.121 Canteens and institutional dining-rooms	0.06
11.122 School and university dining-rooms	0.21

Source: Prepared by M.A. Durán using data from the Family Budget Survey, 2008.

world wide epidemic of obesity, which is associated with recent development and low socio-economic status (Popkin 2009)⁷² (Table 4.2). The category of consumption in pubs and discotheques, as in the case of banquets and celebrations, could be considered to constitute leisure as much as, or even more than, nutrition. Of the rest, the set meals, company canteens, and school dining halls, are clearly transfers of the provision of food services from households to the market, although the financing added by the entities (schools, companies, etc.) cannot be detected, nor whether it is public or private. Consumption in bars and cafes, as well as in restaurants, combines one nutritional component and a second social component, and even an element of work representation, which are difficult to distinguish. But where there is no doubt is that the number of meals served by households throughout the day and over the year is much higher and more substantial in nutritional terms than what is consumed outside the home, and yet households do this with a proportionately low input of money because it is complemented with a great deal of non-remunerated work⁷³.

⁷² It is estimated that 800 million people are undernourished and 1,300 million are obese.

⁷³ The Family Budget Survey (Encuesta de Presupuestos Familiares) does not make it easy to see the changes in the food function from the perspective of the time employed in final production, because the type of food is taken as more important than how easy

Although the sum of money invested in purchasing food is proportionately small, the time devoted to converting that food into an edible product is very high. According to the INE's Time Use Survey (2002-2003), 43% of men and 88% of women devote some time to cooking on workdays. Men who cook devote an average of 0.81 hundredths of an hour to it every day, while women devote 2.04 hours a day. If all of the time devoted to this activity is added up (purchasing foodstuffs, storing them, processing them, serving them, cleaning up, and table service) throughout the year, it turns out that the activity consumes approximately the same amount of time as industry as a whole.

4.6. Is pregnancy work? International variations in the ideal number of children

The fall in the birth rate in the developed countries is the best proof that pregnancy can be considered collectively to be an unnecessary activity, although over the long term it could mean the disappearance of the group itself and/or the replacement of one set of groups by others. The replacement rate for the developed countries is estimated to be between 2.1 and 2.4 children per woman, but in Europe the majority of countries are well below that minimum figure, which is only achieved by Iceland (Eurostat 2009a, 52-53). From the standpoint of National Accounting, the birth of a child reduces the income per capita, while the birth of a lamb increases it. Someone who looks after the sheep is considered to be a person in employment, while a person who looks after children is considered to be out of the market. Nevertheless, few could doubt that carrying and giving birth to a child is laborious, that looking after the child is an absorbing occupation, and that children are even more necessary to a society than sheep. How can we reconcile the view points of the market with those of society as a whole?

Although children do not have a price, and their value cannot be estimated using market criteria, the effort expended in preg-

it is to find and prepare. Some foods, such as baby foods, could be indicative, but the price of the total units consumed cannot be broken down.

nancy and childbirth is partially included in the National Accounting (García-Díez 2010) by means of paid leave, subsidies for childbirth, and social benefits related to infancy. In the strange game which the market imposes by determining different values for different types of workers, the child of a woman who comes from the developed world is expensive, while that of a woman from the developing countries is cheap. Within each country, the children of more qualified women cost more — in terms of lost earnings and in terms of leave of absence — than those of less qualified women. In simple terms, it could be said that women in developed countries have few children and those from developing countries have many, some of whom migrate to the developed countries in which the markets are growing more rapidly than the population which supports them.

Furthermore, pregnancy may be high risk work in some circumstances. Just in sub-Saharan Africa, 265,000 women die as a result of childbirth every year, and 4.5 million children of less than five years of age also die of causes which could be avoided (PRB 2009b). Recently, estimates by the Institute for Health Metrics and Evaluation, University of Washington (IMHE, April 2010) reduce the figures published by UNICEF by 30%; instead of 536,000 deaths among mothers in 2008, they estimate that it was 343,000, although they acknowledge that the data continue to be insufficient. In spite of unequal access to health services, clean water, and sewage systems, the degree of cover through vaccination throughout the world is improving, and infant mortality is falling. While 13 million children of less than five years of age died in 1990, this figure was brought down to a still terribly high figure of 9 million in 2008 (PRB 2010b).

On average throughout the world, each woman has 2.6 children. In the developing countries, even though pregnancy does not appear in the National Accounting, it is a high risk occupation. In spite of the undeniable advances, 1 out of every 75 women still dies from causes related to pregnancy. In the fifty countries classified by the United Nations as least developed, this proportion rises to 1 out of every 22 women, while in the developed countries the work of pregnancy only ends in the death of the mother in 1 out of every 6,000 women.

The work of pregnancy is repeated frequently in the less developed countries: Women have an average of 4.7 children throughout their lives, which contrasts with the 1.6 of the developed countries.

Excluding China, which has opted for a model involving strict birth control (which is not free of other difficulties) as a premise for eradicating hunger and achieving economic growth, the average in developing countries as a whole is 3.2. The United States is also an exception because, although it is a developed country, the fertility rate is 2.1 children per woman, and they are born when the women are younger than in other developed countries. The role of minorities or ethnic groups with different demographic compositions from the majority cannot be ignored in countries with a complex structure. For example, the fertility rates of Mexican immigrants in the United States are not only higher than those of other social groups, but they are also higher than those of the social group they originate from in Mexico (Reanne and Henueline 2005, 12: 77-104).

The data published by the Population Reference Bureau for a selection of countries⁷⁴ in respect of the ideal number of children for men and women by age group can be seen in Table 4.3, followed by the actual fertility rates. According to data from eighteen developing countries, in the opinion of men aged 30-34 years old, the ideal number of children ranges from the maximum of 12.5 children seen in Chad as the ideal, to the minimum of 2.1 children in Bangladesh. In all of these countries, women from the same age group indicate an ideal number of children which is parallel to that stated by men but, generally speaking, lower. The social and family structure explains these large differences between countries. In a polygamous family system, the high number of children desired can be associated with the desire to have several wives, which in turn is an indicator of financial and social success. In Chad, although the ideal number of children also scores the worldwide maximum, the difference of the model between men and women is three and a half children, 27.2% lower among women than among men. As may be seen in Table 4.3, intergenerational change is fast, and young men from 20 to 24 years old have reduced their ideal number by more than 3 children in comparison with the preceding generation; there

⁷⁴ The PRB has published data on a greater number of countries which can be consulted on-line; only a selection has been taken for this Figure in order to make it more easily comprehensible. In some countries data is not available for all age and gender groups.

TABLE 4.3: The ideal number of children by age, gender, and country

	A	B	C	D	E	F	G
	30-34 years of age		20-24 years of age		Percentage A over D*	Total Fertility	Percentage F over D
	M	W	M	W			
Chad	12.5	9.1	9.3	8.4	148.8	6.3	75.0
Mauritania	7.8	6.8	6.6	5.5	141.8	5.1	92.7
Mali	7.2	6.5	6.4	5.8	124.1	6.0	103.4
Congo	6.9	6.6	6.3	6.0	115.0	5.3	88.3
Benin	6.0	5.1	4.8	4.5	133.3	5.7	126.7
Liberia	5.6	5.2	4.7	4.3	130.2	5.8	134.9
Gabon	5.2	5.3	4.8	4.4	118.2	3.6	81.8
Ethiopia	5.1	5.2	4.0	4.1	124.4	5.3	129.3
Ghana	4.9	4.7	4.1	3.8	128.9	4.0	105.3
Zimbabwe	4.3	4.0	3.8	3.2	134.4	3.8	118.8
Malawi	4.1	4.5	3.5	3.6	113.9	6.3	175.0
Rwanda	4.1	4.3	3.7	4.1	100.0	5.5	134.1
Guatemala	3.7	3.7	3.2	3.0	123.3	4.4	146.7
Azerbaijan	2.8	2.5	2.3	2.3	121.7	2.3	100.0
Armenia	2.7	2.5	2.4	2.4	112.5	1.7	70.8
Cape Verde	2.7	2.6	2.7	2.3	117.4	3.1	134.8
Nepal	2.4	2.3	2.2	2.1	114.3	3.1	147.6
Bangladesh	2.1	2.3	2.1	2.1	100.0	2.5	119.0
Turkey	-	2.5	-	2.5	-	2.1	84.0
India	-	2.4	-	2.1	-	2.7	128.6
Peru	-	2.4	-	2.2	-	2.6	118.2
Vietnam	-	2.3	-	2.1	-	2.1	100.0
Colombia	-	2.2	-	2.0	-	2.4	120.0
Ukraine	-	1.9	-	1.9	-	1.4	73.7

* Referring to the most recent years available, *circa* 2000.

Source: Prepared by M.A. Durán using data from the Population Reference Bureau.

has also been a fall among women, and their ideal number of children (8.4) is 9.7% lower than that of men of the same age.

Column E may be considered to constitute *the indicator of the imbalance of the models by gender and by generation*. This is the percentage

of the ideal number of children indicated by young men (30-34 years old) compared to that indicated by very young women (20-24 years old). The ideal number of children is almost five times higher in the case of countries which indicate very high numbers than in the case of countries which indicate very low numbers. The PRB has not published data for Western Europe, or for other developed regions, but the countries with the lowest rates among women from 30 to 34 years old is distributed over various continents: Ukraine, 1.9; Colombia, 2.2; Bangladesh, 2.3; Nepal, 2.3; Peru, 2.4; India, 2.4; Armenia, 2.5; Turkey, 2.5; Cape Verde, 2.6. Insofar as fertility is freely chosen and not coerced, the disparity of criteria between men and women is an indicator of underlying conflict within households.

Column G is *the indicator of the imbalance between the ideal and that carried out in practice* expressed by the younger women. Fertility is much lower than the ideal number of children in the countries which indicate a very high ideal number of children, and this number approaches that of areas with average and low models and reality. They are not exactly comparable, because they refer to distinct age groups and fertility among young women is not the same as that of older women, but the imbalances are considerable. Upwards imbalances predominate, and in Malawi, for example, there are 75% more in actual fact than in the desired ideal. But there are also downwards imbalances, such as the 30% lower number of actual children than the number desired in Armenia. According to estimates by the PRB, the percentage of married women between 15 and 49 years old using modern family planning methods is 60% in the more developed regions, as against 23% in the least developed regions (PRB 2010a, 10). The difference between countries, due also to ideological questions, are even more pronounced: In Switzerland, for example, 78% of married women practice family planning, while in Afghanistan the figure is 16%.

What these figures reveal is that neither the society nor the economy of these countries are comparable, and not even their markets. With such disparate models of maternity, the working population cannot be the same, nor can the rate of inclusion of women in the employment market, nor the quantity and type of consumption, nor the role of the State. In other words, similar economic policies cannot be proposed, and nor can analytical instruments which over-

estimate the influence of the market in economies in which the market still has a relatively small social and economic role.

The *fertility rate* is the average number of children per woman throughout their lives. According to these same data, it is lower than 2.3 in 87 countries⁷⁵. These are demographically dependent countries, which places them at risk of disappearing over the long term if they do not change or receive demographic aid from other countries. All of the developed countries and many developing countries are to be found among them. For example, in Cuba and Canada, fertility is 1.6; in Spain, 1.5; in Japan, 1.4, in Italy, 1.4, in Singapore, 1.3, and in Taiwan 1.0.

In the majority of developing countries fertility rates include a heavy social class component. Women at the lowest income levels make a demographic contribution (or a negative income per capita contribution in terms of National Accounting) with an extraordinary effort which is incompatible with their gaining access to the labour market. Their economic role has little similarity with that of women in the highest income quintile, not only, nor most importantly, because of their access to money, but also because of the type of large family which they procreate and because of the consequences this entails in terms of production and consumption of private goods and public services. The data in Table 4.4 reflect a very dramatic situation, and vividly highlight the differences between the ways of life of women in the different economic strata in countries which in turn occupy distinct stages in the process of demographic transition. In Uganda, where the poorest women have on average eight children, the richest have four. In Colombia, where the richest women do not even have two, the poorest have more than four. And even in Armenia or in Vietnam, where the average fertility is so low that it does not guarantee natural replacement, there is a difference of almost one child per woman between the highest income quintile and the lowest (Table 4.4).

In Spain, the most recent CIS “barometer” survey does not place the perpetuation of the species among the principal roles which the family plays in modern society, in the opinion of those interviewed;

⁷⁵ The fertility rate which guarantees the replacement of the population is normally estimated as being between 2.3 and 2.1 children per woman.

TABLE 4.4: Fertility in poor women and rich women (selection of countries, upper and lower quintiles)*

	A Poorest quintile	B Richest quintile	Percentage A / B
Uganda	8.5	4.1	207
Niger	8.4	5.7	147
Madagascar	8.1	3.4	238
Eritrea	8.0	3.7	216
Tanzania	7.8	3.4	229
Guatemala	7.6	2.9	262
Bolivia	7.4	2.1	352
Senegal	7.4	3.6	206
Togo	7.3	2.9	252
Colombia	4.4	1.8	244
Egypt	4.0	2.9	138
Turkey	3.9	1.7	229
India	3.4	1.8	189
Kazakhstan	3.4	1.2	283
Turkmenistan	3.4	2.1	162
Indonesia	3.3	2.0	165
Armenia	2.5	1.6	156
Vietnam	2.2	1.4	157

* Referring to the most recent years available, *circa* 2000.

Source: Prepared by M.A. Durán using data from the Population Reference Bureau.

on the other hand, the task of bringing up and educating children appear in first place. The process of continuity is unravelling, and the emphasis is not placed upon the arrival of new members of the family, but on the care of those who have been invited to form a part of that family (CIS 2010b).

4.7. Childcare

4.7.1. New models of maternity

The care which a child receives depends upon the country in which it is born, and the social and economic circumstances of the

family into which it is born. In 2010, 17,489 children of less than one year old died every day because they could not be sufficiently cared for, and over the year this figure reached a tally of 6,383,531 deaths. Of those, only eighty thousand were from the developed countries, and more than six million deaths occurred in undeveloped countries (PRB 2010a, 2)⁷⁶.

The future of childcare in Europe has to be sure to take into account and include an essential item of data, which is the transformation of the institution of marriage. The number of children born whose mothers are not married is growing constantly; although many of them are married, in the sense of sharing a house with the father of their children, many others are not. They are legally, socially, and economically single. The dissociation between marriage and reproduction is characteristic of developed countries, although consensual unions are also very widespread in Latin America and some African countries. In Spain, one quarter of all children are born to non-matrimonial unions, the majority of which are *unmarried* couples (Castro Martín 2007)⁷⁷.

Childcare has become internationalised in Spain and in other developed countries in two senses of the word: the first is the arrival of immigrant women of child-bearing age, whose fertility rate is higher than that of Spanish women. In 2002, total fertility in Spain was 1.27, and without the immigrant mothers it would have been 1.19: they contributed 0.08 points to the indicator. In the future, this contribution will probably decline, because it is already declining in their countries of origin, and because they will adapt to the rates in their host countries. In addition to their direct contribution, the indirect contribution of immigrant women to the birth of children is important, since they are frequently employed as carers for children and the elderly, and thus provide Spanish women with the opportunity for their own motherhood (Roig Vila and Castro 2007).

The measurement of the time devoted to caring for children is complex. The Time Use Survey (CSIC 2009) highlights the subtlety

⁷⁶ The data refer to *infant mortality*, that of children of less than one year of age.

⁷⁷ Some indicators which measure the change in fertility outside marriage are the number of births, the fertility rate for unmarried women, and the proportion of those born out of marriage in comparison with the total number of births. This latter is the indicator most used in international comparisons (Castro Martín 2007).

with which the time devoted has to be handled, depending upon whether it is a question of availability or active intervention (Table 4.5).

The estimate of the time necessary for care made by women is almost 10% higher than that by men. However, both men and women agree that it is a very considerable amount of time, which is close to seventeen hours every day. The estimate does not differ much in terms of the marital status or of the age of those interviewed, although it is higher among those older than 65 years of age, who in generational terms fit into the category of grandparents rather than parents. Moreover, it does not vary, and this is a very important piece of data for the purpose of replacement and feelings of incompatibility, between those who devote their time to the household (housewives) and those who are employed.

In Spain, it is not only the parents but also the rest of the family, to some degree, who take part in the care of children. According to a recent CIS Barometer survey, only 12.3% believed that they could not rely on family help for the care of their children if they were to need it (CIS 2010b). Nevertheless, there are many childless households, and only 38.8% of the adult population devotes some of their time to the care of children on working days. Those who do so devote an average of 7.42 hours to it (Time Use Survey 2009). The proportion of carers varies according to marital status. 51% of married men and women perform childcare, 17% of those unmarried, and 15% of those who are widowed. Separated and divorced men and women occupy an intermediate position between the married and the single, both because it is more likely that they do not have

TABLE 4.5: Hours per day considered necessary for the care of a child between 4 months and 1 year by gender

	Average in hours
Men	16.74
Women	18.35
Total	17.58

Source: Prepared by M.A. Durán using data from the Time Use Survey (Encuesta sobre Tiempos de Cuidado) (CSIC 2009).

children, like married people, and because, since they do not share their accommodation with their ex-spouse, they do not share their daily life with their mutual children either. This peculiarity is reflected in the fact that those who do perform childcare devote a greater number of hours per day to it on average than the other groups. The average among those who do care for children is 7.42 hours, but there is a very clear pattern which separates carers who devote an average amount of time (unmarried people: 4.26 hours; widowed people 4.70 hours) from those who are full-time (married 7.87 hours, separated and divorced 8.88 hours).

The difference is striking in the ratio of child carers between those who are full-time (46.4%) and those who are part-time (55.5%), and the amount of time they spend (6.98 hours as opposed to 8.94 hours). There is no doubt that there is a cause and effect relationship between remunerated work and non-remunerated care for children; in other words, part-time workers who look after children give them two additional hours every day, and this detracts from the possible amount of time they could devote to the market. Furthermore, their propensity to care for children is increased by ten percentage points in comparison with those who are full-time, which represents an increase of 19% in relative terms (Table 4.6).

Students, because of their age and their cultural allegiances, contribute little to the collective workload of childcare. The unemployed (the rate of unemployment is much higher among young people) do not have a very high care rate (40.1%) either, but those who do care for children devote a considerable amount of time to them. Retired people do not retire from caring for children, and one out of every five usually does so, although more in the form of partial complementary care than as principal carers in an intensive manner. With respect to housewives, a group in which women of mature age are very common, the care rate is similar to that of all employed people as a whole (men and women). Those who do take care of children devote a very large number of hours every day to the task (8.65).

The level of education is higher among the younger generations, in which there is a greater tendency for both spouses to be employed and enjoy a higher level of income. As a consequence of the greater availability of alternative care services, they have a negative associa-

TABLE 4.6: Hours devoted to caring for children on working days, by employment situation

	Total	Total carers	Percentage carers	Hours of care	Average
Full-time	387	179.0	46.3	6.98	4.85
Part-time	45	25.0	55.5	8.94	4.58
Less than 15 hours	10	5.0	50.0	7.39	5.62
Unemployed	179	72.0	40.2	8.59	4.89
Student	58	10.0	17.2	2.83	1.40
Retired	225	46.3	20.6	5.75	4.94
Housewife	151	70.8	46.9	8.65	5.31
Disabled	2	0.9	45.0	12.00	0.00
Other	6	2.1	35.0	4.53	0.68
Total	1,063	410.1	38.6	7.43	5.01

Source: Prepared by M.A. Durán using data from the Time Use Survey (Encuesta sobre Tiempos de Cuidado) (CSIC 2009)

tion with the time devoted personally to childcare. The average number of hours devoted by carers with a high level of education is 7.15 hours, by those with an average level 7.44, and those with a low level of education 7.49 hours. The higher the income, the greater the number of the people who do the caring, and the less time they devote to it.

The groups with the highest household incomes (mostly two income households), with more than € 3,000 per month, have the greatest tendency to care (41.9%) because these relate to the central ages with the greatest time devoted to their employment, but those who do the caring devote very few hours to direct personal care (3.74%), the lowest ratio among all of the groups classified by level of income.

In multi-member households (six or more persons) it is more probable that there will be children and, therefore, the caring ratio increases to 69.4%, but the time devoted per carer is rather less than in households with an average number of members. At the other end of the scale, people do not cease to take care of children just because they live alone. 7.8% of people who live in single person

households habitually take care of children during working days, and devote an average of 3.54 hours to this.

35% of women and 23.6% of men say that they take care of children or play a role in caring for children every day. Occasional carers are not very frequent, although 8.3% of women and 8% of men take care of children once a week.

Carers are concentrated around the age group from 30 to 49 years of age, as many as 50.7% of which take care of children every day. Below this age there are as few carers, as is the case of the 50 to 64 year age group. Among those older than 65, the role of carer declines considerably, but there are still 8% who take care of children every day (Graph 4.1).

GRAPH 4.1: Daily care for children less than 16 years old, by age of those interviewed
(percentage)



Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

With respect to the preferences for the care of children of less than one year old, the option chosen by the vast majority is that they should be taken care of by both parents (63%), and this opinion is particularly prevalent among the younger age groups, those with a low socio-economic level, and men. It is a hypothetical question, given that the majority of those interviewed do not have children of less than one year of age, nor do they have prospects of having them; many of them do not even have a partner, but this reflects the state of opinion about how to cope with the infant years.

The Time Use Survey does not specify in detail the degree to which care should be distributed within the couple, but in any case it is striking that the option of doing so alone is only mentioned by 19.8% of women and a tiny proportion, albeit still visible, of men (3.8%). Among housewives, the option of looking after children personally is considerably higher (30.8%) than among all women taken as a whole. There are very few women (1.4%) who would opt for their partner being the one to take the principal role of taking care of the children, but nor are there many men (only 9.0%) who indicated as their preferred option that only their partner should do so. There is no doubt whatsoever that the option which is supported explicitly by most is that childcare should be shared between the two parents. Be that as it may, almost one fifth chose options in which other family members or carers who are not part of the family play an important role in addition to the couple (Table 4.7).

Options which entail the involvement of paid carers, whether workers contracted by the family themselves, or through infant schools or kindergartens, are preferred by 13.3% of those interviewed. If the survey had posed questions giving rise to more nuanced answers, differentiating between normal principal care and

TABLE 4.7: The preferred options for caring for children, by gender

	Total	Men	Women
1. Person interviewed and their partner	63.1	69.0	57.5
2. Person interviewed	12.0	3.8	19.8
3. Partner	5.1	9.0	1.4
4. Kindergarten/person hired full-time	4.6	3.9	5.3
5. Kindergarten/person hired a few hours, remainder parents	7.2	6.4	7.9
6. Kindergarten/person hired a few hours, remainder grandparents	1.5	1.5	1.6
7. Grandparents or uncles/aunts, whole working day	1.8	1.3	2.3
8. Person interviewed, partner, grandparents, or uncles/aunts	1.8	2.3	1.4

Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

occasional support or support in extraordinary circumstances, recourse to the extended family and institutional support would probably have appeared with greater intensity. A preference for carers from outside the family is expressed more by those interviewed with a high socio-economic level (14.8%) than by those with a low socio-economic level (10.1%)⁷⁸. A difference of 4.7 percentage points may appear small, but in relative terms it is the equivalent of an increase in the preference for these options of 46.5%.

Unlike the Time Use Survey, the CIS barometer survey of March 2010 posed the case of an extreme dilemma in which one or other of the parents was obliged to abandon their job partially or completely in order to care for their children and the home. The purpose of this question was to extract underlying preferences by means of the theoretically egalitarian model. Very few men (2.4%) or women (3.0%) were in favour of it being the father and more than one third opted for the mother (37.0% of men, and 35.3% of women), but the majority responded that it did not depend on gender but on other factors (56.3% of men, and 57.8% of women). The differences of opinion expressed by men and women were small, and the difference in attitudes is due principally to age (among those older than 65 years of age 61.0% were of the opinion that the woman should stay at home, as opposed to 23.5% among those from 25 to 34 years old), and to education level. 68.4% of those with no education and only 14.5% of those who have higher education believe that if it becomes necessary it should be the mother who should give up work.

4.7.2. The accounting fiction of investment in education

Households spend more time on childcare than any other educational institution and they offer a wider range of services. If childcare is provided outside the household, it is considered to form a part of GDP, and is calculated as an investment in human capital, which does not happen if it takes place inside the home.

At the Barcelona Summit 2002, a target coverage of 33% was set for schools for children from zero to three years and 90% for those from four to six years. These targets have not been fully met in

⁷⁸ In 1986, in high income households with children, 24% habitually used paid help for feeding the children (Durán 1988, 152).

Spain, and in the academic year 2006-2007, only 17.3% of children under three years attended school, and it has been estimated that there was a deficit of 300,000 places in kindergartens in order to cover the objectives (CES 2007). For children of three and four years old the percentage of those attending school reaches 95% and for those of five years old, 97%⁷⁹. It is more frequent for children between zero and two years old to attend private facilities (57%) than public ones (43%), but from the age of three years onwards attending public institutions is predominant⁸⁰.

In economic analysis the available capital is frequently taken into consideration, but human capital is not always included in addition to the gross physical capital. *Gross physical capital* is defined as “the set of long-term fixed assets (those which last more than one year), tangible, reproducible, and available at any time to be used in the productive process”. It is normally broken down depending on whether the ownership belongs to public capital or private capital (Delgado and Álvarez 2002, 5).

The consideration of education as an investment in human capital has been the practice for the last two decades (Jorgenson and Fraumeni 1992; Corrado, Hulten, and Sichel 2006), and has been promoted by many bodies (National Research Council 2005), but the demarcation of the limits of what is observed poses difficulties. The very term *human capital* provokes rejection in many analysts, who consider it to be inappropriate since it commodifies education excessively⁸¹. The United States Bureau of Economic Analysis (BEA) measures the investment made in educational centres but does not measure that made in work centres themselves. Moreover, in order to adapt to the standards of the National Accounting, it only measures investments made via the market (Aizcorbe et al. 2008, 12). It

⁷⁹ Prepared by M.A. Durán, using data from the INE, Education Statistics 2006-2007, and “Estimates of the Current Population of Spain” for 1 July 2007. The figures refer solely to centres authorised by the Public Administration.

⁸⁰ In the case of Mexico, the presence of three children in the household increases the domestic work of the woman by eleven additional hours per week, but does not increase that of the man. At the poorer levels, children who have a scholarship spend twice as much time devoted to study when compared with those of the same level who do not have a scholarship. Girls devote five more hours per week to domestic chores than boys, who disappear if they receive a scholarship to study (Orozco 2005, 6-17).

⁸¹ Federico Mayor Zaragoza, with the authority granted by his former responsibilities in UNESCO, is one of the dissident voices rejecting this term.

does not take into consideration the time invested by the person who is studying, a resource which is generally more valuable than that analysed.

Human capital is measured by the permanent inventory method on the basis of the expense attributed annually to education. The *education expense* is an indicator of the investment in persons and their future productive capacity. The scarcity of homogeneous sources makes comparative analysis difficult, and many studies have confined themselves to public education expense, because that is the only one for which reliable data exists. The indicators most employed are those of the *general expense* (which make it possible to follow the rates of change by country), and the *population-weighted indices* and the proportion of these with respect to the domestic gross added value. These may in turn be refined by means of applying correctors depending on the average purchasing power of the country.

The usefulness of such indices for international comparative analysis depends upon the capacity of the data bases used, and on the homogeneity of the social structures being compared. In countries where the private sector is heavily involved in education, or where the private sector invests principally in certain types of education (primary or secondary) the public expense figure may not be a good indicator of the investment in human capital and indicators of the school population by age groups are more useful. Furthermore, the financial component of profit is to be found in private education, and this does not exist in state education. Nor is there any means of evaluating the quality and efficiency of the two systems. By definition, if only the expense is measured, the more expensive education will always be evaluated as the better, although this may not necessarily be true. The comparison becomes even more complicated if non-profit making entities are included, and in some regions and in some social groups such bodies are extensively involved in the education sector. These bodies cannot be analysed in terms of expenses, because a part of their services is offered free of charge by those collaborating with these organisations, or by a volunteer workforce.

The educational systems of each country vary considerably in the length of the school day, in the services offered to pupils (food, transport), in the out-of-school activities, and in the activities which are offered during vacation periods. How can these different activi-

ties be harmonised, and how can their contribution to the formation of human capital be interpreted? For example, in the European Union, there are countries with a high proportion of children below the age of five years old who go to kindergartens and infant centres, while in other countries the proportion is low. In Austria, Germany, Spain, Greece, and Portugal, school hours are short, and there are no meals, while in Belgium, France, the United Kingdom, Sweden, and Japan, school hours are longer, continuous, and include the midday meal. In Norway or Denmark, school hours only cover 22 hours a week, but care is offered after school (Zárate 2003).

It is paradoxical that if they are measured using the normal expense criteria, the investment made by the mother, the father, or some other close relative in the education of the child is counted as non-existent in the indicators of investment in human capital. Perhaps this is correct from the standpoint of the strict market logic, but it is totally senseless and must be borne in mind in view of its potential for interference in the preparation and evaluation of public educational policies.

4.8. Care of the sick and the disabled

4.8.1. The level of health in the population

Sickness is manifested as a worsening of the general state of health and by means of specific illnesses, which may be episodic or chronic. Among the episodic illnesses a distinction must be made between those which are caused by accidents and the rest. In undeveloped societies, episodic illnesses are of particular importance as originators of the demand for care, while in the developed societies chronic illnesses related to aging, and the preventative activities which are intended to safeguard health, consume huge amounts of time in care, both remunerated and non-remunerated.

Although health is the most appreciated and important asset⁸², the market is an insufficient route for providing health care services

⁸² According to Study 2844 of the Centre for Sociological Research (Centro de Investigaciones Sociológicas), health scores the highest (9.64 points on a scale from one to ten) ahead of the family (9.54 points), and considerably more than work (8.51 points) or financial well-being (8.27 points).

to those who need them. In undeveloped countries only a small part of the population is able to afford to pay for health services at market prices, and still less for care services (Rodríguez 2000, 229-272; Zambrano 2000, 275-317). In the developed countries, extensive sectors of the population are also unable to gain access to health and care services when they most need them, unless they have previously transferred resources to cover this eventuality (obligatory and voluntary health insurance).

Health, income, and financial capacity to fight illness or to obtain care form a circle of mutual influence: the sick become poor and the poor become sick. In order to access higher levels of income, the majority of households need to accumulate various incomes from employment, and place almost all of their capacity for labour onto the market. This would be impossible if one of the spouses were to be sick or if the household were to take charge of a sick family member who requires intensive care time.

The 2008 Report of the Commission on Social Determinants on Health, CSDH, part of the World Health Organisation, concludes that improving health requires an improvement in the daily living conditions and in justice as regards the distribution of power and resources at all levels (Ziglio and Simpson 2010, 54 et seqq.). For example, the life expectancy of white women in Brazil is 73.8 years, while that of black women does not reach 70 years. The life expectancy of women is 7.7 years greater than that of men, because of the falling mortality arising from pregnancy and childbirth, and because of the growing urban violence suffered by men (SEPM 2010, 15). Throughout the world the demand for healthcare is growing at a higher rate than that of the rest of the economy. When this demand is satisfied by the market economy, whether through companies or public services, it consumes growing proportions of monetarised resources, but these also have to be considered to represent investments in productive capacity, particularly when the demand for care is applied to the infant and juvenile population (Fraumeni 2005).

In the United States, the BEA estimated in 2006 that spending on health reached 16% of GDP, while in 1997 it had only been 13.5%. The criteria for the inclusion of different costs are not standardised, and different entities follow different criteria. Moreover, not all of the costs are included in the health account, because oth-

ers are posted to different accounts (for example, transport). The analysis of costs is not equivalent to the analysis of the services provided, because variations in prices affect the total cost despite there being no change in the services. The analysis of the quantity of health services provided can be refined by the type and quality of the services provided, for example by including individualised treatments and interaction therapies (“spoken”) as against merely pharmacological therapies. It is for this reason that many health economists are pushing for the creation of satellite accounts for the health sector (Aizcorbe et al. 2008).

Almost all of the countries in the OECD have put tax deductions in place for the care of ascendant and descendent relatives, but there is wide variation; in some countries it is a fixed deduction, in others it is progressive in accordance with the number of children, and in others it is a function of different age ranges. In some countries it is dependent upon the carers earning income from employment, but in the majority it is not; in general the deduction is very useful for the person receiving it, but it may act as a disincentive for women who take charge of dependent relatives from finding employment. The elasticity of the supply of jobs for married women in view of the tax treatment of their income is greater than that of men, both in respect of the decision to work and in respect of the number of hours worked (Zárate 2003, 9-21).

In the European Union there are countries with a relatively high proportion of the elderly (more than 15%) who are cared for in institutions (Finland, Denmark, the Netherlands, Norway, Sweden, the United Kingdom) or at home with public support. The Netherlands and the United Kingdom provide few services for the care of children, in that it is a model in which care for children is assigned virtually exclusively to the family, while the State assumes the responsibility for caring for the elderly (Zárate 2003, 28).

4.8.2. Levels of health in Spain and the scales of demand for care

National health surveys are the principal source of information about needs related to sickness, but these surveys are focussed on health aspects and offer relatively little information in respect of social and economic aspects. Surveys on standards of living are lim-

ited in information as regards morbidity among adults, but prolific in information in respect of the socio-economic standards of households. Evidence for the association between low incomes and poor health can be found on the basis of this survey. This association is well-known throughout the world, and in Europe it was the reason behind the *Together for Health. A Strategic Approach EU 2008-2013* programme, which recognises this link although it only employs indicators referring to institutional health (the number of beds per head of population, the number of doctors, and so on) (Eurostat 2009, 64 et seqq.). Age causes the simultaneous loss of health and income (retirement, loss of opportunities, or of full-time work), and sickness in itself has a negative influence on income. In Spain, there is an average difference of six tenths in the general state of health between the lowest and the highest levels of income, that is, a loss of 15%. In the lowest income group, 19.2% of adults are in poor or very poor health.

One aspect that should be highlighted, and which may be eclipsed by the surveys that only offer data about the consumption or demand for care, is that in the same social groups that produce high demand or consumption of care, there are people who produce it in quantity and in quality. This is particularly frequent among persons of advanced age, and among women; as a whole they are intensive consumers of care, but they are also intensive producers of care for themselves and for other social groups.

Table 4.8 uses a five-point scale for weighting the general state of health according to data from this survey, with 5 points corresponding to “very good health” and 1 point to “very poor health”. The “index of demand for care” is the expression of this from the point of view of those who are obliged to satisfy the demand for receiving attention. It has been constructed using a five-point scale, inverse to the scale above, in which those who enjoy good health only score 1 point on the scale, while those who suffer very poor health score 5 points. By comparison with the household income, this index expresses with greater clarity the difficulty experienced by low income households in satisfying their needs for care via the market (purchasing health and care services).

There is a clear association between age and the health index, which falls several tenths in each age range. If the index is 4.3 points

TABLE 4.8: **General state of health by annual income band of household in 2007**
(vertical percentage)

	Total (in thousands)	Very good (percentage)	Good (percentage)	Fair (percentage)	Poor (percentage)	Very poor (percentage)	Not stated (percentage)	Health Index	Index of demand for care
Total	38,042.7	15.8	57.0	19.3	6.1	1.7	0.1	3.8	2.1
Up to € 9,000	3,229.0	10.2	41.0	29.6	15.3	3.9	0.0	3.4	2.6
From € 9,000 to 14,000	4,032.1	11.1	46.8	28.3	10.4	3.4	0.0	3.5	2.5
From € 14,000 to 19,000	5,091.7	11.9	53.6	24.2	7.6	2.5	0.1	3.6	2.2
From € 19,000 to 25,000	5,999.3	15.6	56.6	19.6	6.5	1.5	0.1	3.8	2.1
From € 25,000 to 35,000	8,247.0	18.0	60.0	16.7	4.2	1.1	0.0	3.9	2.1
More than € 35,000	11,443.6	19.4	64.7	12.6	2.5	0.6	0.1	4.0	1.9

Source: Prepared by M.A. Durán using data from the Living Conditions Survey (INE 2008).

The *health index* is obtained by multiplying the percentage of persons at each level of health by scale A and dividing by 100. Scale A: Very good: 5; Good: 4; Fair: 3; Poor: 2; Very poor: 1.

The *index of demand for care* is obtained by multiplying the percentage of persons at each level of health by scale B and dividing by 100. Scale B: Very good: 1; Good: 2; Fair: 3; Poor: 4; Very poor: 5.

on average for young people from 16 to 29 years of age, it is 3.7 for those aged 45, and for those in the following range it falls to 3.1. Women have a worse general state of health than men in all age groups, and the difference becomes more acute in the latter period of life (3.0 for women, and 3.3 for men).

Since it is associated with age, the general state of health is very good among the unmarried (4.1), good among married and divorced people (3.7), and only fair among the widowed (an average of 3.1). Among widowed people, more than one quarter of the total have a “poor” or “very poor” general state of health (26.2%). The evidence provided by comparative research studies in various different countries is that marriage makes for healthy men, even second marriages. Marital stress, divorce, and the death of the spouse have the contrary effect (Fustos 2010)⁸³.

From the point of view of care, widowed people not only need more care than married people, but it is also more unlikely that they will have anyone to provide it for them.

The level of health is associated with employment activity in a two-way process: on the one hand, sick people have greater difficulty in getting into the competitive labour market, and even if they do get in, they lose their jobs easily. On the other hand, those who are finally excluded from the labour market because they have reached retirement age enjoy the average level of health which is appropriate for their age. Among business owners (agriculture, small companies) there are many people of mature age, but it is striking that their perception is that they only enjoy a poor general state of health: they only attain 3.9 points, which is two tenths below employees. The average age of the unemployed, on the other hand, is no higher than the average age of those in employment, and in spite of that their perceived level of health only reaches 3.9 points. Sickness contributes to unemployment, and unemployment contributes to sickness.

The greater part of healthcare takes place in the home, and is non-remunerated, and the health system only takes charge of diagnosis and interventions as needed. In the most serious cases, the sick

⁸³ Comment on *Harvard Men's Health Watch*, based on a sample of 127,545 people interviewed in the United States (Fustos 2010).

leave the home in order to move to a hospital, but this transfer to an institution does not mean that the consumption of non-remunerated care goes down.

According to the CIS (CIS 2009a, no. 2803) 23% of the population over the age of 18 years old has been an inpatient in hospital at least once over the preceding 12 months, and 9% were taken into hospital twice or more times. 52% say that they have suffered no illnesses over the last five years, a piece of data which is hard to reconcile with the information above, and with the information that only 32% of men and 23% of women say that they have not visited their general practitioner (G.P.) to receive a diagnosis, or, in other words, 68% of men and 77% of women have been at least once to the doctor for a diagnosis. Those who have been to their G.P. twice or more go twice as frequently as those who only went once. These figures do not include examinations, tests, treatment, second visits for the same reason, nor consultations with specialists or surgery. Although the survey does not provide information about it, in serious cases, in the case of patients who have difficulty in moving by themselves, and in the case of children, the most common thing is for the patients to go to the medical services accompanied by family members who donate their care time.

Table 4.9 shows the frequency with which various different social groups suffer chronic illness, disabilities, or deficiencies depending on their level of income, both in absolute terms and in proportional terms, together with three scales which summarise the demand for care.

The *severity index* (column G) has been constructed upon a three-level scale, in which non-debilitating illnesses score 1 point, and those which cause serious impediments to carrying on a normal daily life score 3 points. The *weighted demand for care index* (column H) reflects the demand of the disabled or chronically ill for each social group; this is the product of the severity index (G) and the frequency index (B, expressed as a percentage).

In order to express the demand generated by each social group in absolute terms a new indicator has been devised, called the *equivalent demand index* (column I), which is the product of the weighted demand for care index (column H), and the number of persons in each social group (column A). If the disabilities were

TABLE 4.9: Severity of chronic illnesses, by income *

Income	A	B	C	D	E	F	G	H	I
	Population of those older than 16 years of age (in thousands)	Persons with any illness (percentage)	Severely limited (percentage)	Limited but not severely (percentage)	Not limited (percentage)	Not stated	Severity index	Weighted index of demand for care (percentage) (G * B)	Equivalent demand (in thousands of persons) (H * A)
Total	38,042.7	30.2	16.3	45.0	38.7	0.0	1.8	54.36	20,680.0
Up to € 9,000	3,229.0	47.5	21.0	52.1	26.8	0.0	1.9	90.25	2,914.1
From € 9,000 to 14,000	4,032.1	44.0	19.8	49.6	30.6	0.0	1.9	83.60	3,370.8
From € 14,000 to 19,000	5,091.7	36.3	19.1	47.1	33.8	0.0	1.9	68.97	3,511.7
From € 19,000 to 25,000	5,999.3	30.4	15.7	45.1	39.2	0.0	1.8	54.72	3,282.8
From € 25,000 to 35,000	8,247.0	25.1	13.1	41.0	45.8	0.0	1.7	42.67	3,518.9
More than € 35,000	11,443.6	21.4	11.7	39.2	49.1	0.0	1.6	34.24	3,918.2

* Referring to sickness, incapacity, or chronic deficiency and degree of impediment involved in carrying on their daily activity.

The scale employed for the severity index is: C=3; D=2; E=1.

Source: Prepared by M.A. Durán using data from the Living Conditions Survey (INE 2008).

scantly debilitating (weighting = 1), the number of persons in this indicator would coincide with the number of disabled or chronic people, but if all the disabilities were seriously debilitating it would be tripled (weighting = 3). In the adult population in Spain taken as a whole (38 million people), 30.2 people out of every 100 suffer some kind of permanent impediment, they constitute only 11 million people, but their need for care due to their impediment is equal to that of more than 20 million people with no limitation of any kind.

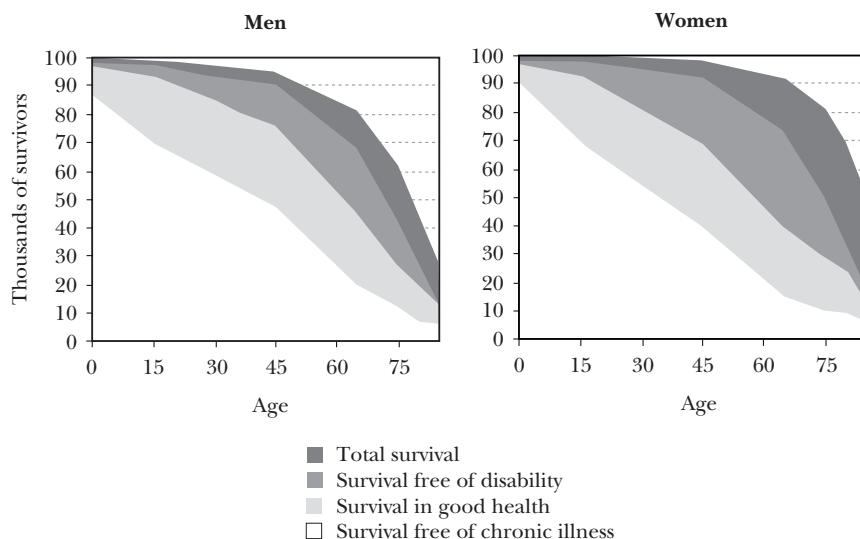
The level of income is associated inversely with the demand for care index, which, in the lowest income band, almost triples that of the highest income. Other data not reflected in the aforementioned figure show that among young people only 10.4% suffer any kind of permanent disability (sight, hearing, etc.), but this figure reaches 62.2% among those over the age of 65. In the central age groups, the proportion of women with disabilities is slightly lower than that of men, but it is much greater in the advanced age group (65.4% as against 57.8%). Cultural factors such as less difficulty in acknowledging their own weaknesses, and organisational factors such as the poor network of socio-sanitary protection may contribute to this difference, but not so much as to explain it entirely. Young people, who make up a total of 8 million persons, produce a demand equivalent to 1.2 million persons. And those over the age of 65 years old, who add up to 7.3 million persons, produce a demand equivalent to 9 million people under this heading.

Widowed people have a demand for care index four times higher than unmarried people, and women are 25% higher than men. If two circumstances are combined, for example age and sex, the variation increases sharply: the index of demand for care among women of greater than 65 years old is nine times higher than that of men from 16 to 29 years old.

4.8.3. The graphic expression of the decline: survival curves and correlative demand for care

Graph 4.2 shows the mortality and morbidity curves by age and sex in Spain, which is not very different from other developed countries. Throughout the developed world women die later but are more frequently sick. This is due to biological and social causes, such as a conduct less exposed to risk, illnesses related to pregnancy

GRAPH 4.2: Observed mortality and theoretical curves for survivors of disability, poor health and chronic illness. Lines of survivors



Source: INE, 2002 Survey on disabilities, deficiencies, and states of health, 1999. www.ines.es/inebase/index.html

and different access to care services, both institutional health services and informal services. In the less developed countries, the differences are greater because of the worse access to nutrition and the greater risk entailed by pregnancies and childbirth (PAHO 2009, DCP 2006).

The highest line marks the boundary between life and death, and reflects the number of people who remain alive in each age band and delimits the area of those who have died at the upper edge. The improvement in social and health conditions have caused this line to become closer and closer to the ceiling and for longer, although inevitably it has to fall at some moment in time. Public policies have to adopt benchmark models in respect of the optimum for this boundary line, how much collective effort has to be devoted to maintaining its high level and for how long.

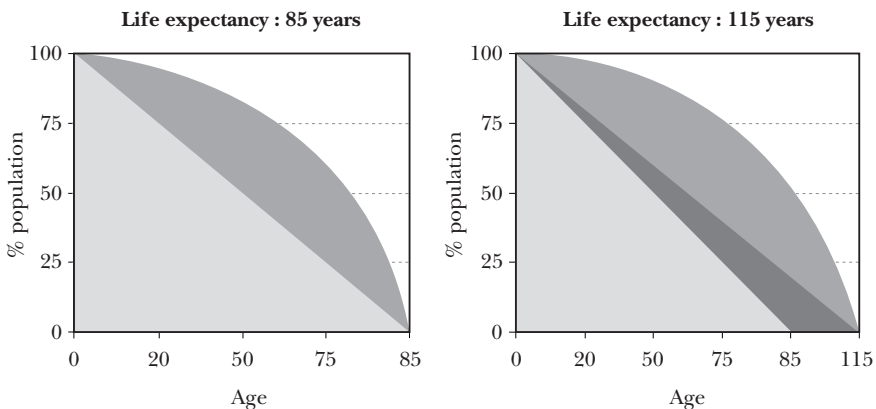
The lowest line is the line that reflects total health, without any type of illness or disability. It has a similar profile to the diagonal, at

a slope of 45° , which represents a moderate but continual loss of health as the years go by. Health and social policies have to decide what collective effort can be applied to reduce the slope of this line, and the most appropriate measures (prevention, education, environment, surgical interventions, pharmacology, technical complements, etc.) to achieve this.

The intermediate lines reflect the growing levels of sickness, disability, and dependence. Although health may be considered as a whole, public and private intervention has to prioritise its objectives depending on whether preference should be given to modifying one or other type of line; each of them has its own characteristics in respect of benefits and the type and quantity of resources in time, money, and opportunity cost which it consumes.

Human longevity increases at a rate of six hours per day. Graph 4.3 refers to a population with a mean life expectancy of close to 80 years. When the life expectancy of the population exceeds 100 years, as is already the case for the recently born generations in the developed countries (PRB 2010c), the resulting curves will be very different, with a greater proportion of the population in the intermediate area between health and death. The most probable hypothesis is that the level of health will improve in comparison with the current generation in each age group, but the number of people in a state

GRAPH 4.3: The prolongation of life expectancy, and the increase in the population requiring care (working hypothesis)
(percentage)



of “non-health” and the proportion of this group in comparison with the total population will increase⁸⁴, although this hypothesis is not unanimously accepted. Long-term forecasts in the developed countries should be made for populations with a life expectancy of 115 years. The first part of Graph 4.3 shows a simplified survival curve free of sickness and with sickness, with an estimated life expectancy of 85 years. The hatched area corresponds to the population with some health problems. In the next part it has been estimated that life expectancy has increased to 115 years. The dark dotted area corresponds to the increase in the healthy population in comparison with the preceding situation, and the hatched area represents the population suffering from illness, which is greater in this estimate than in that corresponding to the previous graph.

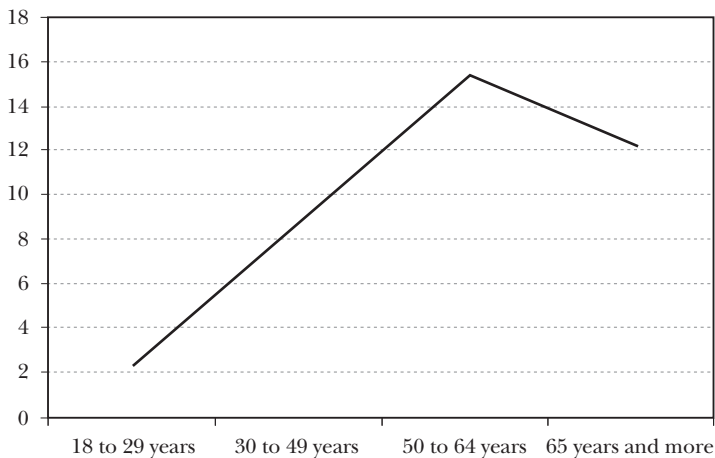
4.8.4. Non-remunerated carers of the sick: differences in gender, age, and socio-economic status

From the point of view of care, chronic and disabling illnesses have a much greater impact than short-lived episodic illnesses. In the case of the second group automatic mechanisms to provide cover are provided (days of sick leave for a sick family member) in legislation and union agreements, while there is no automatic cover for the first group. A recent CIS survey showed that a small portion of the population (1.8%) believes that nobody would care for them if they were to fall sick, but they do not specify the type or duration of the illness. The care of the long-term sick is an absorbing task which consumes immense resources of time. Almost 10% of adults provide daily care for sick or disabled persons (CSIC 2009). Women take care of disabled people every day — without specifying for how long — by a proportion which is twice that of men (12% as against 6.5%).

⁸⁴ According to Casado Marín (2005), overweight and other chronic pathologies increased in Spain between 1993 and 1998. The prevalence of elderly persons who felt dependent fell by 2%, which may be due to better material living conditions, healthier habits, and innovative medical treatments. Other writers, such as Otero Puime (2005) highlight the importance of being able to rely on the support of children or other persons of confidence for the maintenance of mental health. The feeling of dependence is partly cultural and the shortage of carers increases the capacity — whether willingly or not — to take care of oneself.

The age at which this commitment is at its greatest lies between 50 and 64 years old (15.4% providing care every day), because they take care of sick and disabled people from their own generation as well as from the preceding generation. In the most elderly age group, the commitment is similarly fairly high (12.2%), although the proportion of family members of the same generation requiring daily care (principally the spouse) diminishes. 14% of housewives take care of sick or disabled persons on a daily basis, and 11.3% of retired people (Graph 4.4).

GRAPH 4.4: Daily care of dependents by age of those interviewed
(percentage)



Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

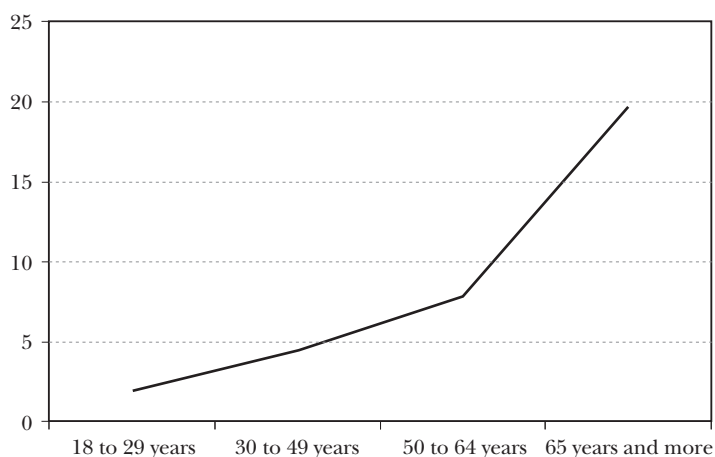
Contrary to the situation in respect of the care of children, the highest levels of socio-economic status are those who assume less care of sick and disabled people. The families of sick and disabled people belong proportionately more to the lower socio-economic levels, which is an important piece of data for health and social policies.

It should be pointed out that ideological factors (left- or right-wing voters) will find no visible statistical reflection in the number of close family members in either the infant or the elderly

stages, nor in the fact that care is provided to them on a daily basis.

Disability is not just a problem for other people, it also affects oneself. The proportion of those interviewed who said in the cited survey that they had personal difficulty in carrying on the activities of their daily life without help was 7.6%, and of those, 6.2% to a moderate degree and 1.4% to a serious degree. Put the other way round, 18% of those who stated that they were dependent suffer severely, and the remaining 82% moderately. The proportion of dependent people increases continually through the cycle of life although at a slow rate, and intensifies sharply after the age of 65 (Graph 4.5).

GRAPH 4.5: Difficulty in living daily life without assistance
(percentage)



Source: Prepared by M.A. Durán using data from the Time Use Survey, Spain (CSIC 2009).

Among those older than 65 years, 20% have difficulty: 15.6% have moderate difficulty, and 4% have severe difficulty. As in all surveys, it is predictable that the severely sick and disabled are underestimated, precisely because their poor state of health makes it difficult to obtain access to interview them, and increases the number of those admitted to institutions which do not form a part of the sampling plans.

4.9. The care of dependent elderly people

4.9.1. The loss of autonomy as a consequence of the aging process

In 1900 in Spain, life expectancy at birth was 35 years. Barely a century later in 2010 this had risen to 80 years. The major change is due to the reduction in infant and maternal mortality, but also, although to a lesser extent, to the prolongation of the life expectancy of those who pass maturity and reach retirement age. In countries which crossed the frontier of infant and maternal survival decades ago, the social objectives have been displaced towards a new frontier, i.e. that of improving living conditions for the elderly population and extending the healthy period without dependence. Success has been spectacular in quantitative terms (the number of years lived), but not so much in qualitative terms (the number of years lived without illness). The number of years lived has grown, as has the number of years lived without illness, but so has the number of years lived with illness. Degenerative and chronic diseases are the corollary, the other side of the coin of health and social progress which has been without historical precedent.

The indicators of life expectancy (the number of years one is expected to live) have surpassed the indicators of healthy life expectancy. On average, European men who reach the age of 65 years old still have 16.84 years to live, and European women 20.40 years. Women who reach this age will live on average three and a half years longer than men, but this apparent gain virtually disappears if the comparison is made between the indicators of healthy life expectancy; European men can expect to live 8.70 healthy more years and 8.14 years of ill health, while women can expect to live 8.90 years in health and 11.50 years of ill health. Women have an advantage of 0.2 years free of sickness (three months) but their life expectancy in ill health is 3.36 years (1,226 days) greater than that of men.

In Spain, the indicators are not very different from the European average of the 27 countries which form the European Union. Life expectancy at 65 years of age is one year higher for men than the European average and a year and a half longer for women. In just one year, from 2007 to 2008, the average life expectancy of men at 65 years of age increased by the equivalent of one month and two

days. Life expectancy in good health is greater by more than one year than the European average both for men and for women, and the difference is greater for men (1.60 years). With respect to life expectancy in poor health, Spanish women who reach the age of 65 have 11.99 years or, in other words, 4,176 days, of ill health. Certain indicators are less positive than others with respect to the increase in the number of years of healthy life⁸⁵.

Some European countries, such as Iceland, Denmark, and Sweden almost double the European average life expectancy at the age of 65 years, and this does not depend on genetic differences but on life style and an efficient social organisation for this purpose.

Both social, economic and health policies have to plan for the care of an elderly population, with the consequences of illness that the aging process entails. The national differences within Europe are considerable, both in terms of life expectancy and healthy life expectancy and in the systems provided to address economic survival beyond working age and to maintain the best possible quality of life for the population who are ill. In some countries, such as Japan and Korea, the expansion of socialised care has become an electoral matter because of the increase in the number of people who live alone and the fall in tri-generational families. In China, the obligation that children have to take care of their parents or ancestors has been reinforced by legislation (Razavi 2005, 8). Everywhere, and particularly in the developing countries, carers receive little attention from Social Security, generally reduced to workers with formal employment, and nor do they have money to buy it on the market (United Nations 2010). In Ghana, Ethiopia, Kenya, Nigeria, Tanzania, Uganda, and in Zimbabwe, the proportion of women in the female working population who receive a salary is very low, and only in Nigeria did it reach one third (Razavi 2005, 10).

The indicators of aging, and above all those of illness and dependence in advanced old age, must become a potent element in weighting indicators of development or wealth based exclusively

⁸⁵ According to Eurostat (2010), healthy life expectancy in Spain was 62.9 years in 2007 and 63.1 in 2008, a gain of two tenths of a year; but in 2006 it had been 63.27, and between 2001 and 2003 it had surpassed 69 years, which proves that the trends are non-linear or that methodological differences affect the indicators.

upon monetary elements, such as GDP. Care for the elderly population is indispensable and must include budget planning, both public and private, and is a huge pending liability which requires copious resources if it is to be paid for appropriately.

Does it have to be the current working population who have to finance the care of those who are not working? Does it have to be the working population who finance their future care, through their taxes and private pension plans, when they stop working? Should it be the “non-working” population who have to take responsibility for care on a massive scale, in particular the elderly who are no longer working? All of these questions are of the greatest political, social, and economic importance, in which decision-making requires previous in-depth studies and reaching consensus between the social groups who will have to provide the resources to meet the growing demand.

The weakening of physical condition as a result of the aging process implies the abandonment of tasks which in previous stages were carried out on a daily basis. Some of these activities were carried out as self-care, and are not normally considered to represent non-remunerated work. Others were carried out for the household as a whole, and are indeed normally considered to represent non-remunerated work. Certain of these unperformed tasks cease indefinitely because nobody takes responsibility for them, but many others are transferred, to a greater or lesser extent, to family members, friends, neighbours, public services, institutions, companies, volunteer workers, or domestic employees. As they are performed by persons other than the person who enjoys them, they become work (whether remunerated or non-remunerated), or at the very least a donation of private time. Personal hygiene is a good example of this transfer: it can be reduced by an extraordinary amount in comparison with the average societal standards, but if there are sufficient care resources available, a high level of quality can still be maintained even in the most unfavourable cases (incontinence, etc.).

From the point of view of predicting the demand for non-remunerated work as a function of age, Table 4.10 is useful because it expresses in summary form the loss of autonomy in the habitual domestic tasks in the younger elderly group people and the older elderly group.

TABLE 4.10: **Loss of autonomy in domestic work between 65 and 85 years old**
(percentage)

	A	B	C
	Carried out by person interviewed at 65-69 years old	Carried out by person interviewed at 85 and more years old	B/A
Washing clothes	53.8	23.1	42.9
Small repairs	49.6	10.7	21.6
Doing the shopping	60.1	22.4	37.3
Doing the cleaning	50.9	14.0	27.5
Doing official business	64.3	22.6	35.1
Cooking	57.1	31.7	55.5
Taking care of sick members of the family	43.8	9.2	21.0
Average	54.2	19.1	34.4

2,755 interviews. The "Other" and "No answer" groups have not been reproduced because they are a very small number.

Source: Prepared by M.A. Durán using data from the CIS "Elderly Persons Living Conditions Survey, 2006".

Not all activities are equal consumers of time, nor do they require the same dexterity, training, or emotional involvement. If these factors were to be included in order to give a weighting to each activity, more accurate indicators could be obtained.

The transfer of activities is strongly associated with age and sex, and the two factors are mutually associated. On average, men as a whole are slightly younger than the women taken as a whole, and have a greater reliance on their spouse, who is generally younger than them and is in a better physical condition. Gender bound socialisation factors are also influential; the majority of women only transfer the domestic tasks when they have considerable physical difficulty in performing them, while men usually transfer them even when they no longer take part in the remunerated activities which formerly occupied their time.

Up to 65 years of age, domestic work is taken care of almost completely for each person, together with their partner. Table 4.11 reflects the transfer of the domestic activities to third parties as age

TABLE 4.11: The transfer of activities as a consequence of aging
(percentage)

Activity	Person performing the activity					
	Age ranges	Person interviewed	Husband /Wife	Child or other family member with whom they live	Family or neighbours with whom they do not live	Domestic worker
Washing clothes	65-69	53.8	38.0	1.8	0.5	3.0
	85 and +	23.1	10.9	36.8	9.3	16.4
Small repairs	65-69	49.6	21.9	9.0	9.3	0.2
	85 and +	10.7	2.5	40.5	25.0	4.0
Doing the shopping	65-69	60.1	26.8	3.3	1.3	0.9
	85 and +	22.4	7.7	42.9	12.2	9.3
Doing the cleaning	65-69	50.9	34.8	2.9	0.2	6.8
	85 and +	14.0	9.1	34.0	11.3	27.1
Doing official business	65-69	64.3	22.7	6.5	2.0	0.1
	85 and +	22.6	4.0	45.7	20.3	3.7
Cooking	65-69	57.1	37.3	1.8	0.5	0.8
	85 and +	31.7	12.0	35.3	7.2	10.7
Taking care of sick members of the family	65-69	43.8	20.1	3.7	2.5	0.5
	85 and +	9.2	7.1	44.6	5.4	5.8

2,755 interviews. The "Other" and "No answer" groups have not been reproduced because they are a very small number.

Source: Prepared by M.A. Durán using data from the CIS "Elderly Persons Living Conditions Survey, 2006"

increases, and as physical condition deteriorates. Aging is frequently accompanied by the death of the spouse, and as a consequence the sharing of domestic work is no longer possible and, therefore, work has to be transferred to other people whether or not they are paid. Although recourse to hiring paid employees is not the majority solution for any task, in the case of cleaning it is the main solution in 27% of cases among those older than 85 years of age, where it becomes four times more frequent than in the group aged 65 to 69 years. Resorting to paid workers is not so frequent in other activities,

but the frequency of hiring someone increases tenfold between 65 and 85 years; for example, it ranges from 0.5% to 5.8% in the case of care for the sick. The activity which it is least possible to delegate is that of administration, which does not reach 4% among the most elderly.

Due to economic reasons, the majority of the elderly are unable to hire full-time, or even part-time, employees to take care of them. This is not the only reason, but it is the main reason. In addition to the spouse, who is frequently unable to assume the tasks because of their own physical difficulties, the people to whom the tasks are delegated are the children or other family members sharing the home. They play a very small role in the group from 65 to 69 years old, when health is still good, but they become the principal providers of such services for those over the age of 85. For example, while doing the laundry only fell upon 1.8% of children living with their parents aged 65 years old, the figure reaches 36.8% when they are 85 years old. The displacement of the activity of preparing and cooking meals is very similar. In all of these tasks, the family members who share the home assume responsibility for the task in more than one third of cases.

Family members who do not share the home do not play such an intense role as substitute providers of services as those who live in the same home, but their importance should not be ignored, particularly in the case of activities which are not dependent on a timetable or on being present. The activity in which their contribution is most visible is in small household repairs, and this is already relatively high at the beginning of this stage (9.3%, which is even more than among those who share the home), and reaches 25% for the group over the age of 85. Contributions made to household administrative tasks, which in 20% of cases are carried out by women, are also highly visible. On the other hand, their contribution to the care of the sick is not comparable with the contribution of the family members sharing the home.

The everyday activities of caring for oneself are transferred principally to the spouse, and secondly to the daughters. In Spain, as is shown by the Elderly Persons Living Conditions Survey, the displacement of activities occurs towards the women of the family. Men displace more than women, and much more to their daughters than

to their sons. In the majority of everyday activities, it is more probable that they will be done by a paid home help than by a male child.

All other providers contribute a very small proportion of the care work taken as a whole, although they may be decisive for the person or the household which receives it. Among the undisclosed data the role of the male and female grandchildren is noteworthy, since their contribution to the majority of the tasks is more frequent than that of the daughters-in-law, who contribute more than sons-in-law or other family members. Neighbours make a visible contribution to shopping (4.2% of cases) and "other domestic chores" (4.6%, but only for men), and also to providing company for going out (but only for women, 2.1%).

The role of the paid home help for the elderly who receive some type of assistance is important, and is second in importance only to the activities transferred to the spouse and the daughters. Nevertheless, there are tasks which are difficult to transfer, and it is most likely that they will be performed by a child than by a paid worker. The most easily transferred are those which have to be carried out on a fixed schedule, frequently and reliably, such as help in eating, dressing, putting shoes on, washing, doing things around the house, getting up or going to bed, preparing food, cleaning the house, taking medicines, and using the lavatory. The least transferrable are those which involve greater intimacy (showering), which require a degree of confidence (shopping, official administration, telephone calls, handling money), or which are performed away from the home (going out, using public transport, going to the doctor).

Of all of the activities we have indicated, the one which is least entrusted to hired home help is the administration of money, but even in this activity it is the hired help who takes care of it for 3.7% of the elderly who received some type of help: 1.8% in the case of men, and 4.3% in the case of women. The difference is due in the lower availability of family members for women, and in particular their spouses.

In spite of the growth in social services, their role continues to be proportionally very low: in no activity do they reach 5% of mentions among those who receive some type of assistance. Their contribution is higher in activities which have some socio-hygiene element and are

performed within the home, such as washing or getting ready (3.8%), showering (4.8%), or getting up or going to bed (3.7%).

4.9.2. The excessive load of carers: the application of the Spanish dependency law

Care is a form of non-remunerated work, and carers not only contribute time and monetary resources, but also frequently suffer adverse effects on their own health in cases of long-term care. Analysts usually differentiate systems of care for elderly people by the degree of State and family participation. However, even in countries which have very highly-developed public systems for the care of the elderly, the role of the family continues to be very important (Rogero-García 2010). An estimate of the cost of long-term care has been carried out for the United States by the National Institute on Aging. In the informal care of people with dementia alone, a situation which affects more than 10% of those over the age of 65 in the United States, more than 18 billion dollars are spent per year (2001) (PRB 2007, 1).

In Spain, informal carers also save money for the national Budget and for insurance companies (Durán 2004), thus permitting less extreme tax pressure and good quality attention within the home. Public opinion is ambivalent about the question of the responsibility of the State and the family in caring for dependents; although people hope that the State will increase the benefits, there is no confidence that this will be done properly or soon, which are two indispensable qualities in the care of dependents in the family. The majority of the population continues to believe, although with hesitation and as part of a clear process of transfer of responsibilities, that this has to be done by the family before having resorting to social services. This was the opinion of 60% of those interviewed in a recent survey by the CIS (CIS 2010b).

The increase in life expectancy and the scarcity of public services have led to exhaustion in hundreds of thousands of families, which are obliged to take on the care of dependents with barely any external assistance⁸⁶. According to the Survey on Informal Support for

⁸⁶ In the presentation of the research study *Support for dependence in Spain. The current situation* by the Fundación CASER for dependence carried out in November 2009, it was

Dependents, 91% of carers agree with the statement that it is their moral obligation to take care of that person, although 51% are of the opinion that “there’s no option”, 22% believe that “that there is no way out”, and 21% believe that “it is too heavy a burden” (Immerso 2005, 49; Jiménez-Martín 2007). Some 85% of carers provide care every day, and 40% devote between 8 and 24 hours a day to this activity. 45% of carers suffer from chronic illness. Admitting dependents to institutions is an option which is increasingly being demanded, but it is still not a majority opinion, even among those carers who believe that it is an excessive burden for them.

Old people’s homes are beyond the reach for the majority of the population, unless they are subsidised, but the number of places available in subsidised or publicly-run homes is very much lower than the demand. From the range of prices in geriatric homes advertised on the Internet (in January 2010) we are able to establish a variation in prices of between € 1,450 (public ownership) and € 2,250 (privately owned). This is the price for non-dependent residents, who are able to take care of their own basic needs (eating, sphincter control, washing, taking medication)⁸⁷. Regardless of whether they are publicly or privately owned, these homes offer additional services which are not included in the basic price. The prices are higher in the major cities, and are lower in small localities.

The prices of old people’s homes vary depending on the type of accommodation (location, quality of the building and the facilities, separate room, etc.) and on the services offered, and are much higher for dependent residents. For example, changing posture constitutes an extra which some residents require six times a day. The same is true of changing incontinence pants, or help in eating.

estimated that only 10% of families who take care of a dependent person receive any type of support from the Public Administrations. In 80% of cases, the carer is a member of the family, and in 52% it was a filial relationship. 80% of carers are women, with an average age of 52 years old. Other sources estimate that the percentage of women among non-professional carers is 88.5%.

⁸⁷ The Spanish painter Salvador Dalí (1904-1989) was one of the first people who made the cost of dependence in contemporary Spain visible to public opinion. Sick and alone, various nurses and other domestic staff took turns to accompany him and look after him during the last days of his life. It cost a fortune every month, which caused amazement in a society which had only recently found prosperity and in which care was a family activity accessible to the vast majority.

Rehabilitation, speech therapy, or company are chargeable services which are added to the basic fee. Some residents who are severely dependent pay more than € 5,000 per month for the residence (in the year 2010), in addition to the health provision which they receive at the same time from the Social Security (pharmacy, diagnostics, surgical interventions, etc.), and the time devoted by their family members in managing their care⁸⁸.

With respect to the role of the Public Administration in the care of dependent persons, the majority public opinion is that there are major differences between Spain's various regional autonomous communities. This is the opinion of two thirds (63.4%) of those interviewed who gave a response in the Time Use Survey (CSIC 2009). 28% did not respond to this question. Among those who consider that there are differences between the regional communities, one quarter considers this to be positive and three quarters negative. Unfortunately, the survey is only representative at a national level, and the probable hypothesis cannot be confirmed, namely that those who are in favour of these differences live in regional autonomous communities which have implemented more generous and more effective programmes of better quality for the care of dependent people than other regional communities (Table 4.12).

The Dependency Law instilled a great deal of hope, but failed to measure sufficiently the cost which would be involved in putting it into practice. Unfortunately for the dependent people and their families, the development of the law coincided with a severe economic crisis and unemployment has been absorbing a significant part of public resources. Unemployed workers are a group with the capacity and tradition of organisation, and therefore with the potential to exert political pressure, which is not the case for the majority of dependent people — in particularly those who are elderly — or with their families. The unemployed have the time to organise their demands, while the families of the severely dependent lack not only

⁸⁸ Anti-aesthetic metal appendages which serve to permit access to dependent people in wheel chairs are beginning to become frequent in the entrance halls of urban dwellings in Spain. The installation of these provokes lengthy and complicated conflicts among the owners and neighbours, and this is only one of the many questions in which the family of people who, as a result of an incapacitating illness, require constructional improvements in the access to their own dwellings have to become involved.

TABLE 4.12: The heterogeneity of the measures adopted by the Autonomous Communities (D54)
(percentage)

	Total responses (%)	Similar in all Autonomous Communities	Many differences between the Autonomous Communities; valued positively	Many differences between the Autonomous Communities; valued negatively
Total	71.7	36.5	18.1	45.2
Men	75.3	36.1	20.5	43.6
Women	68.3	37.2	15.8	47.0

Source: Prepared by M.A. Durán using data from Time Use Survey, Spain (CSIC 2009).

the necessary time to exert political pressure but even the time to look after themselves and to cover their own minimum needs.

The cited law advocates that dependent people should achieve the highest possible degree of autonomy, and should be attended by professionals or in residences and specialist centres, and the law provided that only in exceptional cases would they be cared for by non-professional family carers. During the preliminary phases of the preparation of the law the associations of the disabled had insisted that the law should serve to reduce dependence as much as possible, providing them with the technical and financial resources to facilitate personal autonomy and organise the hiring of specialist non-family carers. The reduction of dependence entails access to activity, and consequently to the incorporation of dependent people into the labour market, and therefore the investment could be considered to be profitable in terms of GDP, in a similar manner to other investments in health. The application of the law has led to just the opposite of what was expected: the labour and services market which was expected to grow under the protection of the law has only grown moderately, and 78% of the aid administered (June 2009) has gone to non-professional carers, to the order of between € 320 and € 590 per month⁸⁹. In spite of the special agreement for carers to

⁸⁹ Statement made on 13 June 2009, in Valencia, by the General Secretary for Personal Autonomy and Dependence.

be registered with the Social Security, by the year 2009 only 50% of them had done so. The law also foresaw that accommodation conditions could worsen considerably for dependent people and their carers, and it therefore limited the receipt of aid to those cases in which “adequate conditions of habitability and sharing of housing are satisfied”. In practice this is a condition which it is impossible to satisfy if the Administrations does not offer alternative housing to dependent people, because it gives rise to the paradox that precisely those who were living in the worst housing conditions would not be able to have access to aid even for their care⁹⁰.

4.9.3. The gap between supply and demand: the unmet demand of the sick and the elderly

From a political point of view, unsatisfied demand is as important as, or even more important than satisfied demand. The public authorities have to choose whether to make it invisible, and keep it quiet, or to make it visible and explicit. They also have to decide between dissuading it and enhancing it. The unsatisfied demand for care appears in all age groups, and in all levels of society, but it has a different form and intensity in each. The degree of resignation or conflict is very much determined by cultural and social factors. The most active groups, who are strong, in good health, and have a capacity for organisation, compete under better conditions than others in order to make themselves heard, and to convert their needs into social and political demands. Because of their age and health, children do not have capacity in themselves, but they can be represented by their parents insofar as there is no conflict of interest. Depending on the type of illness, sick people have varying degrees of probability that they will make themselves heard, with those suffering from mental illness and severe illness being in the worst position (Durán 2002; PAHO 2008, 99:148).

With respect to the elderly, the data in Spain contributed by the

⁹⁰ The Ombudsman made statements in 2009 in which he said that he receives “many complaints” in respect of problems in the application of the law, in particular because of the lack of funding. The study by the Fundación CASER quoted above estimates that the general population values the work of the System for Autonomy and Attention for Dependence (SAAD - Sistema de Autonomía y Atención a la Dependencia) at 5.6 points out of a scale of 10, but that those directly affected only value it at 3.8 points.

Elderly Persons Living Conditions Survey are illuminating (CIS 2006a). Of those who need and receive help for some everyday activity, 48% believe that it satisfies all of their needs, 29% believe that they would need more help, although they feel satisfied, and 18.5% consider that the help that they receive is insufficient or very insufficient. In general, opinion as to whether the current generation is better attended to than preceding generations is negative, and only 7% believe that things have improved, as against the 51% who believe that things have gotten worse.

With respect to the question of who should be responsible for taking care of the elderly, the most widely held opinion is that it should be the family, with the support of the Public Administrations, but those who prefer the mixed option, with the Administrations taking prime responsibility with the support of the family, is almost as frequent. The option of care exclusively by the family is becoming weaker among the younger generations.

4.9.4. Preferred options for the location of parents in the event of dependence

On the assumption that they would have to take care of their dependent parents, and that the option would be presented as to whether to bring them back to the home or keep them in their own homes, the majority opted for bringing them to the interviewees' homes (53.2%). This is the majority opinion both among women and among men, although women support this option with greater frequency than men (Table 4.13).

TABLE 4.13: **The location of the parents in the event of dependence, by gender**
(percentage)

	Answers	Total	In house of those interviewed	In house of mother / father	Undecided
Total	96.1	100	55.4	29.7	15.0
Hombres	96.8	100	50.9	32.5	16.4
Mujeres	95.4	100	59.6	26.8	13.5

Source: Prepared by M.A. Durán using data from the Time Use Survey, Spain (CSIC 2009).

The option of taking the parents back to the homes of their children is inversely proportional to occupational status, and, in turn, is slightly associated with age; at the lower level, which has a rather higher average age, this option is three times more frequent than that of keeping the parents in their own home (61.2 as opposed to 20.4%). At the higher level, the option of bring them back to the children's home also predominates, but the difference is not so great (47.5% vs. 32.5%). These are options with different financial implications, and respond — to a large extent for that very reason — to different traditions of care. The same tendency can be seen on the basis of the level of income. Maintaining dependents in their own home can only be achieved with abundant resources of time, residential space, and money, which up until now have not been within the reach of the majority of households of a low socio-economic status.

The options available for caring for dependents are much more open than the alternatives for the residential location posed above. As can be seen in Table 4.14, any of the six options mentioned in the survey attracts a significant number of supporters. The option

TABLE 4.14: Most desirable situation if your father/mother were to require assistance in basic activities
(percentage)

	Total	Men	Women
1. Residence or day centre	11.8	12.9	10.8
2. Care principally by a paid person	13.9	18.1	9.9
3. Care by the person interviewed and a paid person	22.2	21.3	23.1
A Total 1+2+3	47.9	52.3	43.8
4. Care principally by the person interviewed	28.6	23.6	33.3
5. Care by other family members	7.8	8.6	7.1
6. Care by the person interviewed and by other family members	12.8	12.7	12.9
B Total 4+5+6	49.2	44.9	53.3
Percentage of B/A	102.7	85.9	121.7

Source: Prepared by M.A. Durán using data from the Time Use Survey, Spain (CSIC 2009).

which receives the most support is that those interviewed should be the ones to provide care for their parents (28.6%), but it is closely followed by the option proposing sharing the care with a paid person (22.2%). The next most frequent option is that a paid person should be principally responsible for the care (13.9%), and if this is added to admission to a home or the use of a day centre (11.8%), they form the main block of responses orientated towards solutions which are not based principally on family care. When these two options are added together, they reflect an opinion held by 25.7% of those interviewed; it is not the majority opinion, but it is that of a large and growing group. If we add the option that family care and paid care should be split into two equal parts, paid care forms a substantial part of the option which is most desired by half (49.3%) of those interviewed who responded to this question.

On analysing by gender, it should be pointed out that the options preferred by men and by women are slightly different. Men are more in favour of solutions which involve the externalisation of the care service outside the household.

Options based on care by the family themselves reflect the contraction in the size of family networks. At the time when families had many children, other family members effectively took charge of disabled parents. Nevertheless, if the current intention is to base care on the family, it is probable that it would have to be assumed personally, because there are often no other close family members with whom to share the care or to whom to delegate it.

The diversity of options, in addition to the very availability of the time to assume this reflects the transformation of care models. The option of taking charge of the parents personally as the principal carer is only preferred by 18% of those younger than thirty years old, but it gains support continuously through each age range until it is much more frequent than any other opinion among those over the age of 65 (43.7%). Nevertheless, even in this group it does not even obtain the support of the majority of those who expressed their opinion. The options which entail the total or partial externalisation of care towards carers from outside the family are held by a majority in all age groups except for those over the age of 65. For them it is still a minority option (34.1%), because three factors combine to favour care by the family members themselves: a) financial factors

(they lack their own resources to commit to the payment of paid carers; b) cultural factors (they are themselves part of a group with the tradition of care in the parents' own home); c) having time available to be able to commit to the care. The majority are retired people or housewives and the time spent on care for dependent elderly relatives does not directly compete with the need for care by their own nuclear family or with their employment obligations.

The sense of an obligation to assume personally the care of dependent parents is expressed with greater intensity by women (38%) than by men (25%). This sense of obligation is clearly associated with age, and only 29% of young people below the age of 30 express it, as opposed to 41% of those over the age of 65.

The manner of linkage with the labour market is both a cause and a consequence of the sense of obligation to provide permanent direct care for dependent parents. Among those employed only 25% express this sense of obligation, which rises to 34% among the unemployed, 35% among the retired, and 43% among housewives.

The differences are also very evident by socio-economic status. At the lower end of the socio-economic scale, the option of taking responsibility as the principal carer is the majority, whereas at the higher end of the scale it is not. The option of basing care principally on a paid person is twice as frequent at the higher end as at the lower end of the scale.

The use of residences and day centres for the care of family members who require help for basic needs is slowly making headway in Spanish society, and in many cases it is considered to be the only option. It is already an option which is as frequently preferred (11.8%) to sharing care between various different family members in equal amounts (12.8%) and is more frequent than the opinion that it should be other family members who take responsibility for the case.

Unlike other options, none of the relevant variables cited up to now is particularly worth mentioning here: neither socio-economic status, nor age (except in the case of the more elderly, who are more hostile), nor gender (although it is preferred slightly more by men). What is revealed by this absence of major differences is that the acceptability of the institutional model has already taken root amongst broad swathes of Spanish society. At any rate, the response would

have been different had a distinction been made between private, high-cost residences, and all other public or semi-public institutions, at a moderate cost or free of charge. For people of low socio-economic status, and for a large part of those in the intermediate levels, the option of a private residence is financially beyond their reach, and consequently is not one that can be taken into account. Since the survey did not specify the type of residence, those interviewed have expressed their general preference for institutionalisation, without specifying the actual type of residence to which they were referring.

A CIS barometer (2009a) survey was carried out almost simultaneously with the Time Use Survey, and it included a number of questions regarding care. As can be seen in Table 4.15, only 37.1% of those interviewed thought that it was the family or close relatives who should take responsibility for the needs of elderly people who live alone. The rest believe that it is the Public Administration who should do so, or the Administration and the family together. Women are slightly more in favour of the mixed formula than men. Those interviewed with a higher socio-economic status are also more in favour of mixed Public Administration/family responsibility. Workers and pensioners are the occupational groups who remain most in favour of the idea of the family and close relatives taking responsibility, while technical staff, middle management, and office and services employees are less inclined to this.

TABLE 4.15: Who should take care of the needs or problems of elderly people who live alone?
(percentage)

Family or close friends	37.1
Public Administration	25.1
Both	35.3
Other answer	1.2
Doesn't know	0.8
Not stated	0.5

Number of those interviewed = 2,481.

Source: CIS, Barometer survey for May 2009.

4.9.5. Personal expectations in the event of one's own dependence

Social change is bringing with it a reduction in the number of relations, the prolongation of life expectancy, the entry of women into education and employment, the dispersion of the family, and an increase in the breakdown of matrimonial bonds. These are not sudden drastic changes which are going to come together in any one single person, but public opinion clearly sees them as social trends.

The uncertainty which surrounds circumstances of sickness and old age are in contrast with the relative certainty which goes with birth and infancy. In the Time Use Survey, there are very few abstentions in respect of the questions about the care of children of less than one year of age. On the other hand, one tenth of those interviewed did not have a clear idea of what solution their family would adopt if they became dependent themselves. There is no doubt that the circumstances in which this may occur, particularly the time elapsed from the present and the way the household and the network of relationships develop, determine the choice of one solution or another. It is important to highlight this margin of uncertainty, because it is reflected not only in surveys, but also in the adoption of advance measures by the family (for example, taking out insurance, mortgages, liquidation of pension funds, the sale of property, donations of inheritance *in vivo*, and other forms of distribution of wealth), and in public measures for the support of dependent people.

Expectations in the event that anyone might themselves need help in carrying out personal daily activities may not coincide with the preferred options for the care of their own parents; however, they are similar. It is a reference to a time located in the more distant future than the question about their own parents, and therefore to a certain extent they are moulded to a sense of social evolution as those interviewed implicitly see it. Moreover, the sense of guilt and moral obligation play a relatively different role in the two cases: in the case of the parents it is more probable that those interviewed will feel a moral obligation to take personal charge of care and/or keep it within the family circle, or at least express it in this way. When it is a question of care for oneself, the sense of altruistic obligation is not so acute because those interviewed are the receiver and not the donor, and their altruism may even express

itself by relieving their family from the obligation to care for them.

40.8% of those interviewed (45.4%, if only those who responded are taken into account) are of the opinion that their family would take care of them entirely, while the remainder hope that they will have the support of carers from outside the family. The option of a home is chosen by 12%, a sizeable figure but much less than the sum of those who think that their families will contract someone to take care of them, either as principal carer (14.8%) or working simultaneously with care provided by some family member (21.1%) (Table 4.16).

Care exclusively by the family is now a minority expectation, and is more frequent at lower socio-economic levels (44.4%) than at the intermediate (41.7%) and high levels (37.4%).

The gender of those interviewed does not have much effect on personal expectations, although men have a slightly higher expectation that their family will put them in a home.

The most striking results are those relating expectations with the age of those interviewed. The greater the age of those interviewed, which probably means a greater knowledge of the circumstances, the greater the expectation that the family will have recourse to a home, and the less the expectation that care will be supplied exclusively by members of the family. Only 38% of those over the age of

TABLE 4.16: Personal expectations in the event of becoming dependent, by age
(percentage)

	Responses	Total	They would hire a person	They would put me in a care home	Someone from the family and someone hired	Only some person from the family	Other possibility
Total	88.9	100	14.8	12.0	21.1	40.8	0.4
18 to 29 years of age	92.1	100	14.6	9.1	20.9	47.0	0.5
30 to 49 years of age	89.1	100	13.1	11.1	23.8	40.6	0.0
50 to 64 years of age	87.3	100	16.4	12.7	21.1	37.1	0.0
65 years of age and above	86.9	100	16.6	15.7	16.6	38.0	0.0

Source: Prepared by M.A. Durán using data from the Time Use Survey, Spain (CSIC 2009).

65 have any expectation that they will be cared for exclusively by members of their family, and 15.7% believe that they will be admitted to a residence in the event that they become dependent.

In the question of personal preferences there are fewer non-responders than in the case of expectations, but the options widely coincide and are distributed in a similar manner between men and women. Personal preferences are slightly more in favour of the family (44.1%) than expectations, but also slightly more in favour of being admitted to a residence (15.5%). Those of greater age are rather more in favour of the option of the institution, which reaches a maximum in the age group from 50 to 74 years, when direct experience of the dependence of their own parents is common. In this group 18.7% is in favour of going into to a home in their own case if they were to become dependent.

What is expected of the other members of the family in the event that there are adult dependents is above all that they should contribute care on a shared basis (43.6%). Differences of gender, age, occupation, and socio-economic status are visible in the responses.

With regard to the expectations of the family in respect of those interviewed in the event that there are other dependent family members, the same proportion of men indicate that their family would expect them to share care as do women (46%); but only 18.7% of them consider that their family expects to take responsibility for almost all of the tasks, a proportion which is almost half of the number of women who think so (30.1%). On the other hand, a larger proportion of them indicate that their family expects occasional help from them (17.6%), or just supervision (4.1%). With all due caution in view of the very limited number of examples, the proportion of those who indicate that their family would expect a financial contribution (1.5%) is double for men than what it is for women (0.8%). Whatever the case, care is interpreted in a wide sense, and is not restricted to direct personal attention.

4.10. The work of death and remembrance

Death is such a definitive event that it seems inappropriate to refer to it in financial terms. Nevertheless, numerous important social

relations are interwoven around death (the struggle against it, getting ready for it, the period before it occurs, the funeral ceremony, mourning, and keeping their memory alive)⁹¹ in which it is not only the protagonist who is involved, but also the family, friends, and a large number of social agents. We do not intend to explore all of these topics here, but only to indicate that death consumes time and dedication on the part of the person who is dying and on the part of those around them. This time is incompatible with devotion to the market, and consequently, although it may be negative, has financial meaning.

Table 4.17 shows the mortality rate in a selection of countries. With a maximum of 23 deaths per thousand, Lesotho shows to what

TABLE 4.17: General mortality rate* (selection of countries)

Country	Rate	Country	Rate
Lesotho	23	Spain	8
Sierra Leone	20	Australia	7
Afghanistan	18	India	7
Ukraine	16	China	7
Russia	15	Morocco	6
Niger	14	Brazil	6
Cameroon	13	Iran	5
Ethiopia	12	Vietnam	5
Italy	10	Ecuador	5
Japan	9	Mexico	5
Cuba	8	Costa Rica	4
United States	8	Kuwait	2
Argentina	8	Qatar	1

* Number of deaths per year per 1,000 persons in total population.

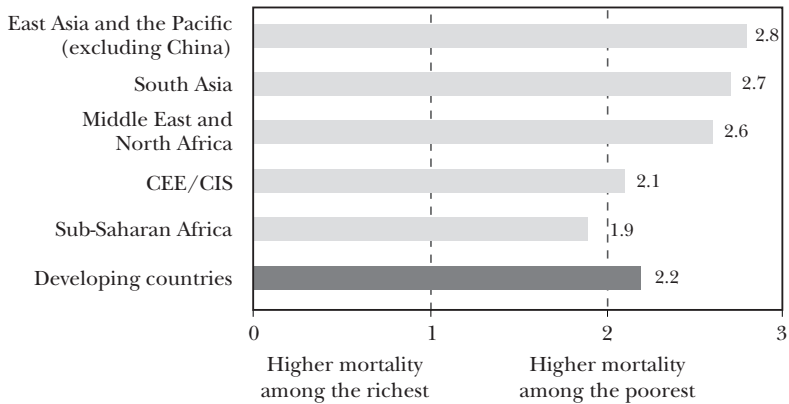
Source: Prepared by M.A. Durán using data from the Population Reference Bureau, 2010.

⁹¹ Businesses related to death and remembrance move budgets of millions, and have been the inspiration for many films and works of literature. The change in public opinion about the autonomy of the sick person in respect of their own death is not analysed in this work. This is a topic of great importance in social, ethical, political, and economic terms which is deserving of monographic treatment.

point dealing with death forms a part of everyday activities. In a large family, the death of relations and caring for them before death and in the hours immediately afterwards is an event which forms a part of what is normal and expected. The psychological work with children who have lost their parents is the purpose of special programmes which involve family, professionals, and volunteers. Care for the sick leads to physical and mental fatigue, and sometimes to a risk of infection and social stigma. In some areas of Africa with a severe incidence of AIDS, little girls and grandmothers have taken on the role of carers in a generation which has a high proportion of orphans. In Zimbabwe, more than half of the orphans live with their grandmothers, while in South Africa and Uganda it is 4% (Razavi 2005, 7).

Perhaps the relative position in respect of the frequency of death which some developed countries occupy will come as a surprise to non-specialists, with examples such as Russia and Italy, which have higher death rates than India or Brazil. This is due to the age structure of the demographics, with very much an aging population in all of the developed countries. Unlike the countries with worse living conditions, death is delayed in the rich countries; but it comes slowly, with a prolonged period of waiting before death which consumes huge resources of time for the person involved and for others. If the persons who accompany and care for the person who is dying were to be paid for this, they would increase GDP. Nevertheless, dying is expensive in terms of care, and only the richest dispose of sufficient money to pay for it. A recent survey by the CIS shows that in Spain almost half of the population would prefer that their immediate family should spend the last days of their life, in the event of a terminal illness, at home (45%), rather than in a health centre (CIS 2009a). The price per hour of carers is no secret, and is displayed in the classified advertisements in the press and in the lobbies of the major hospitals. Part of the care for the dying is paid for by Social Security, and part by companies, in the form of remunerated time off; but by far the greatest part is a donation, necessary but non-remunerated work.

There is no doubt that graph 4.6 on infant mortality by region and levels of income per household is of financial interest as well as social and political interest. It shows that death, and the other side

GRAPH 4.6: Ratio of infantile mortality by quintiles, per regions*

* Analysis is based on 68 developing countries with data on under-five mortality rate by wealth quintile accounting for 70% of total births in the developing world in 2009.

Source: Source for all figures in the first two columns: Demographic and Health Surveys (DHS), Multiple Indicator Clusters Surveys (MICS), and Reproductive and Health Surveys, mainly 2000-2008, re-analysed by UNICEF, 2010. Taken from UNICEF, Progress for Children, Achieving the MDGs with Equity, Number 9, September, 2010, p. 23.

of the coin, life, can be bought if there is sufficient income available. Even when dealing with the same regional context and consequently with many points in common, the death of children is very much higher in the quintile of the poorest than in that of the richest.

In the more detailed country information, these ratios are even greater: for example, in Peru it is 5.17, in Bolivia 4.59, while in some countries in extremely poor conditions such as Haiti (1.5), Niger (1.5), Mali (1.7) or Nepal (1.9) almost everyone runs the risk of seeing their children die. In countries where internal social and economic differences are very pronounced, and many Latin American countries fall into this category, the groups with the highest incomes are effectively able to set up barriers against infant mortality, while in the poorest quintiles the infant mortality rate exceeds one in every ten children. Although it is not a strictly linear relationship, shocks in the aggregate incomes of each country also end up being translated into an increase in infant mortality, especially girls (Baird, Friedman, and Schady 2009). A fall in infant mortality in a country can occur simultaneously with an increase in social inequality when it is the better off groups who absorb the health and nutri-

tional advantages. According to UNICEF, in 18 of the 26 developing countries studied where infant mortality has fallen, the gap between the rates of the first and last quintiles has widened (UNICEF 2010, 22-25).

Just as in the case of adults, the death of a child is the unhappy outcome of a previous fight. A fight to which years of struggle may be dedicated under precarious conditions, and which would be lost in advance if that time were not devoted to it. The United Nations has introduced a reduction in infant mortality as item number 4 in its Millennium Objectives. No-one has carried out a systematic analysis of the distribution of working time and investment which is entailed in the struggle to keep children alive. Nevertheless, fewer investments deserve more attention and respect than this, and the absence of investment is a silence which is clamouring to be filled.

5. The search for equivalents to the value of non-remunerated work

5.1. The cost of work in the labour market

5.1.1. Payroll cost, employment cost, and other labour costs

Non-remunerated work lacks the tradition of research and experience in the resolution of conflicts by means of collective negotiation, and it is therefore necessary to take as a point of reference the rich research tradition on remunerated work, both in respect of pay and in respect of the remainder of the economic exchanges which accompany it, including what is known as “employment costs”. In recent decades considerable advances have been made in the measurement of the quantity and type of non-remunerated work carried out, but there has not been a parallel advance in the research on the value of non-remunerated work. Measurement is principally a technical problem, but the assignment of value entails a need for consensus which has both a political and a technical character. For the moment there is no unanimous agreement, but rather tension and disagreement which can only be resolved by means of partial temporary agreements on how to achieve it. In the search for an integrating analytical framework for the economy of monetarised and non-monetarised resources it is necessary to find equivalence between remunerated and non-remunerated work. That is why in this study particular insistence will be made on the analysis of the cost of remunerated work and the components into which it is to be broken down.

In the question of understanding the value of the non-remunerated time which is expended in households, two principal methods are followed: the output method (the assignment of a value to each

of the goods and services produced), and the input method (the assignment of a value to the resources invested, principally work). Few studies have used the output method, because of its methodological difficulty and the lack of data; the majority have used the input method in its two variants: estimation by the replacement cost and by the opportunity cost. To put them into practice, the most common process is to differentiate the cost of work in accordance with the level of education, age, and gender⁹². If there are no better sources, as a first approximation, the “cost of non-remunerated work” per hour can be equated to the average cost per hour of work for the working population.

In addition to the differences arising from the characteristics of the workers, the analysis of the cost of work includes the analysis of the “employment costs” (taxes and Social Security) levied on work, which are very different throughout the world, and even between relatively similar countries. The OECD has repeatedly warned about the dissuasive effect that the high costs of labour-related taxes have on employment. This is an assumption which some authors, such as Prescott, have used to explain the higher employment rates in the United States than in Europe. In Spain, this is materialised in practice in the programmes aimed at promoting the employment of groups in difficult situations (young people, older people, women, etc.) for whom the Social Security grants special exemptions. In general, there is a trend towards the reduction of employment costs in those countries where they were very high, and an increase in the countries in which they were low.

International comparison is difficult because employment and family situations are very different in each country, and they have a repercussion on the make-up of the “average worker”. Between 2000 and 2007, the tax cost tied to the employment of a worker who is single, without children, and with an average income fell in Germany (where it is still more than 50% of the employment costs), France, Italy, Sweden, Spain, the United States, and in the OECD as a whole. On the other hand, it rose in Japan and in Mexico (where

⁹² Among the analyses by output Hirway cites a number of difference studies carried out by Instraw in Canada, Finland, and Nepal. For input she cites studies on Japan, the Republic of Korea, Australia, Canada, and various European countries (Hirway 2005b, 8).

it does not reach 20% of employment costs) (González and Melguizo 2009, 7-8).

In Spain, the Quarterly Labour Cost Survey (Encuesta Trimestral de Coste Laboral - ETCL) takes a view of work as a cost and not as income. If there was an equivalent survey in which the view of the worker was considered more important than that of the employer, the costs would be considered as income. Workers, and even more so those who administer their incomes, are not usually conscious of the complexity of the components which make up their payroll, and they usually refer to it as the net pay which they receive every month, after the payment of the social security contributions and the income tax withheld. If the average tax withheld from wage earners is 15.78%, a further 19.5% has to be added to the wage usually “recorded” for this item (INE-AEAT 2009) so as to be able to reconstruct the real pay⁹³, in addition to the payment to the Social Security.

The *employment cost* per worker is “the cost which an employer incurs for the use of the work factor”, and its principal component is the cost of the pay. In 2009 (2nd quarter), the average employment cost per worker per month was € 2,547.92, of which € 1,892.42 was pay, € 564.22 was the obligatory contributions and the remainder was allowances and social benefits. In spite of the crisis, the employment cost had risen in all items in comparison with the same quarter in 2008, in particular the cost per hour actually worked (9.6%), because of the change in the proportion of qualified jobs in the employed population. The employment cost per worker varies considerably from one regional autonomous community to another, with Extremadura, Canary Islands, Galicia, and the Community of Valencia being the lowest, while the Community of Madrid, the Basque Country, Catalonia, and La Rioja are the highest.

In 2011, the employment cost was € 2,642.17, with a rate of growth of -0.3. The pay cost was € 1,992.90, and the other costs added up to € 649.27. The cost per hour actually worked was € 20.18 (INE 2011).

⁹³ 19.5% is equivalent to a withholding tax of 15.78% when the calculation process is carried out in the opposite direction, using the remembered wage/salary as the basic of calculation instead of the real wage/salary.

5.1.2. The frontier of the minimum wage

The minimum wage is a legal category. It is established every year by the political leaders in order to set the limit below that prohibited to buy and sell work. The only option for anyone who fails to sell their capacity to work above this limit is unemployment, to become self-employed, or to work illegally under circumstances which constitute a criminal offence (Table 5.1). The minimum wage sets the lower boundary of the labour market, and attempts to prevent it from becoming unregulated and to forestall the appearance of jobs with low productivity (graph 5.1).

In Europe, the minimum wage has a range which ranges from € 112 in Bulgaria to € 1,610 in Luxembourg (Eurostat 2009, 85). In Spain it is set by the national minimum wage (“*salario mínimo interprofesional*”). Between 1998 and 2007, it grew by 53% in absolute terms, which would be rather less if converted into constant Euros, weighting it by inflation.

In households, the criterion of the minimum wage does not have the same importance as it does in companies. The work which is performed in households is generally done by the members of the household itself, and they do not pay systematic attention to estimating its value. Only work which households buy from external workers or companies has a known price, and even that price is difficult to assign to specific functions.

5.1.3. Territorial differences between wages

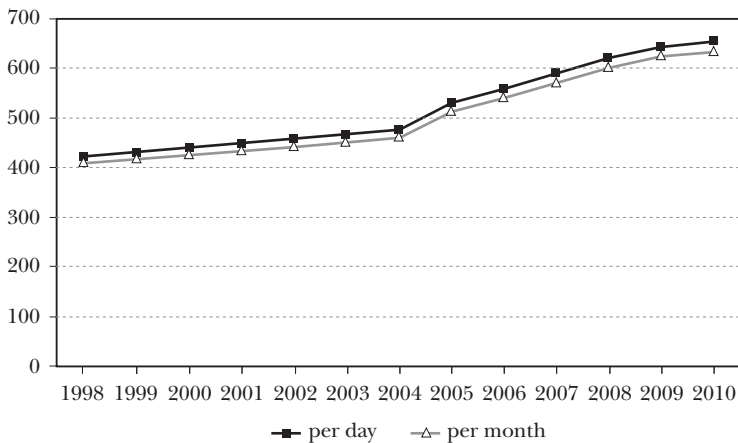
It should be pointed out that the indicators of employment cost

TABLE 5.1: **Change in minimum wage**

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
No age distinction													
Euros/day	13.6	13.9	14.2	14.4	14.7	15.0	15.3	17.1	18.0	19.0	20.0	20.0	21.1
Euros/month	408.9	416.3	424.8	433.4	442.2	451.2	460.5	513.0	540.9	570.6	600.0	624.0	633.3
Increase over previous year	2.1	1.8	2.0	2.0	2.0	2.0	2.0	11.2	5.4	5.5	5.1	4.0	1.5

Source: Prepared by M.A. Durán using data from INE, “minimum wage”, data from the Ministry of Labour and Immigration “Working conditions and Labour Relations”.

GRAPH 5.1: Minimum wage, 1998-2010
(in Euros)



Source: INE, "minimum wage", data from the Ministry of Labour and Immigration "Working conditions and Labour Relations".

are not indicators of efficiency. They offer average values for the entire labour market and there are major differences between workers in line with their level of qualifications, the sector, the type of working hours, the area of residence, regions, and gender. In view of the year-on-year variations, if the reference years of the magnitudes do not coincide, correctors have to be applied. Table 5.2 shows the variation in average employment costs for all workers by autonomous regional community, with the rate of variation in comparison with the same quarter of 2008. In all of the autonomous regional communities, the rate of variation was positive in 2009, with an average of 3.9%. The highest rate of growth was 6.4% (Region of Murcia), and the lowest was 1.8% (Aragón).

Even if the pay remains the same, the cost may vary depending upon the number of hours actually worked. The actual rates of variation per hour worked can also be seen in this table; for all workers as a whole, the employment cost per hour actually worked grew more than the labour cost, with a rate of 9.6%. The increase in the average cost does not mean that any one worker earned more in 2009 than in 2008, but that the entire group of employed workers as a whole did. Unemployment has most affected the youngest peo-

TABLE 5.2: Labour cost in the Autonomous Communities
(in Euros and percentages)

	Labour cost per worker per month				Labour cost per effective working hour			
	2009		2010		2009		2010	
	Total	Percentage of total	Total	Percentage of total	Total	Percentage of total	Total	Peren. of total
Total	2,547.9	100.0	2,642.2	100.0	18.9	100.0	20.2	100.0
Andalusia	2,394.4	94.0	2,427.5	91.9	17.6	93.1	18.7	92.9
Aragón	2,526.6	99.2	2,595.9	98.2	18.7	98.9	20.1	99.7
Asturias (Principality of)	2,549.1	100.0	2,634.7	99.7	19.1	101.1	20.5	101.6
Balearic Islands	2,387.5	93.7	2,609.4	98.8	17.0	89.9	20.2	99.9
Canary Islands	2,173.5	85.3	2,165.7	82.0	15.7	83.1	16.3	80.9
Cantabria	2,329.2	91.4	2,514.9	95.2	17.2	91.0	19.5	96.4
Castilla y León	2,340.3	91.9	2,446.3	92.6	17.7	93.7	19.2	94.9
Castilla-La Mancha	2,316.2	90.9	2,393.5	90.6	17.1	90.5	18.2	90.0
Catalonia	2,771.0	108.8	2,826.7	107.0	20.7	109.5	21.5	106.4
Valenciana (Community of)	2,295.0	90.1	2,361.3	89.4	16.9	89.4	18.2	90.0
Extremadura	2,156.4	84.6	2,258.9	85.5	15.6	82.5	17.0	84.3
Galicia	2,188.0	85.9	2,400.0	90.8	16.1	85.2	18.4	91.4
Madrid (Community of)	2,894.0	113.6	2,990.5	113.2	21.3	112.7	22.2	110.2
Murcia (Community of)	2,314.9	90.9	2,505.1	94.8	17.3	91.5	19.0	94.3
Navarre	2,670.9	104.8	2,837.5	107.4	20.7	109.5	22.4	110.9
Basque Country	2,850.4	111.9	3,090.8	117.0	22.3	118.0	24.3	120.5
La Rioja	2,446.9	96.0	2,526.9	95.6	18.5	97.9	19.5	96.6

Source: Quarterly Labour Cost Survey (Encuesta Trimestral de Coste Laboral - ETCL), 4th Quarter 2010.

ple, the least qualified, and those with temporary jobs, and therefore the crisis has caused the average cost of the workers who still keep their jobs to increase.

If the national average is taken as a benchmark (100), the employment cost in Andalusia is 93.99. This does not reflect the une-

qual value of equal jobs, but principally the different composition of the labour market and the greater proportion of workers with low qualifications. The greatest employment cost in comparison with the national average occurs in the Community of Madrid (113.6%), and the lowest in Extremadura (84.6%)

When there are not enough disaggregated data available on non-remunerated work carried out in households in a region, approximate estimates as to its value can be made, with weighting for geographical location. The wage cost comprises the basic wage, allowances, overtime payments, “13th month” payments, and overdue wages. The effective hourly wage is more affected by seasonal variations (holidays, etc.) than the monthly wage cost. The principal component of the “other costs”, or non-wage costs, is the mandatory contributions to Social Security. These contributions grew less over the reference period than the wage costs. Redundancy payments have also been considerable over this period of economic crisis.

The effective hourly wage, if seasonal and calendar effects are discounted, is not that different from the monthly wage, as is shown in Table 5.2, with a gap of only 6%. The remainder of the increase is due to the different composition of employment, and the different proportion of part-time days in comparison with total employment over the reference period. If the Social Security cost and some allowances are stable, the reduction in the working hours per day has the effect of an increase in the average cost per hour worked.

5.1.4. Real cost and remembered wage

The “remembered” wage is usually much lower than the real wage; on the other hand, the indirect costs of work which are not put into the wage are usually well known and remembered by workers. The following are important:

- a) travel costs;
- b) per diem maintenance expenses; and
- c) company relations.

The indirect costs have a monetary and a time component. Travel entails an obvious cost in time (distance, rush hour, frequency of journeys) as well as in money, which has a greater effect on part-time days than on full-time days, particularly in large cities.

Expenses, if they are paid for or subsidised by the employer and are during working hours, form a part of the wage, although they are not usually remembered as such by workers. On the other hand, workers clearly value the cost of expenses away from their own home (overnight, meals), both in time and in money. For example, if two hours a day are allowed for the main meal, other rests, and interruptions, the time lost is equivalent to 25% of an eight-hour day. If the time devoted to transport every day were two hours, this would add 50% to the time devoted to work in a part-time day of four hours. For a worker whose wage cost per hour worked is the average for all workers (€ 14.03 in 2009), a meal without gastronomic pretensions in a modest set-meal restaurant which costs nine or ten Euros represents more than half (64%) of what they earn per hour actually worked, before tax. On the lower wage scales, it is equivalent to more time. Two single underground tickets in Madrid, at the ordinary rate (€ 1 for each ticket) are equivalent to 14.29% of an hour worked.

Company and union relations, apart from the affective and personal richness which they bring when they are positive, also take up a great amount of monetary and time resources, which are only taken into account in the extremely negative cases of labour conflict and declared strikes. Celebrations, elections, flows of information, etc. form a part of the social life of all work places, and can begin to constitute a high cost in time and money both for employers and for employees. Social activity while representing the company has been recognised in law through the permanently seconded union representatives, but there exist many social activities in companies apart from those connected with unions, which are also financed by all workers and the employers, and are a deduction from the total value of production.

There is a positive association between the level of wages and the size of the establishment in which people work. Large establishments can deploy greater capitalisation, and division of work, and more efficient technologies can be introduced. Moreover, a large number of such establishments belong to public entities in which the productivity and profit criteria which dominate in the market do not apply, and workers employed to produce services (education, health, public administration, and so on) have a higher level of qualifications than the average for the employment market. Taken overall, the average monthly salaries of workers in companies with 50 or more work-

ers are 67% higher than those of establishments with four or fewer workers (Elderly Persons Living Conditions Survey 2008).

Unlike public entities and companies, *households* are very small work units. On average, only 3.7 people live in each household throughout the world, and those who are not in a position to produce services for self-consumption because of their age or some other circumstance have to be deducted from this figure. With one or two workers per household for the production of services, it is difficult to obtain the benefits of the division of labour, capitalisation, and the introduction of new technologies.

5.1.5. The length of the working day and its effect on the cost of work

Although the labour markets in Spain and the European Union are open and EU citizens can travel and work throughout the area, the wage cost is not homogeneous, and varies from one region to another, just as it does between sectors and different occupations.

The Quarterly Labour Cost Survey does not provide information about the self-employed or agriculture, but it does provide information about earners in industry, construction, and services. It gives information about the length of daily working hours negotiated in those sectors, the hours actually worked, and the hours not worked. In the third quarter of 2011, the average negotiated monthly hours of work was 153.1 hours, but 32.2 hours were not worked (the greater part of this is due to holidays), and therefore the average number of hours actually worked every month was 121.6 hours. For full-time workers, the average hours actually worked was 132.5, and for part-time workers it was 74.9. The longest actual working hours were found in the construction sector, and the shortest in services; this latter point is due to the greater frequency of part-time workers.

The employment cost per hour actually worked in 2009 was € 9.00 in services, € 11.20 in construction, € 10.40 in industry, and the average was € 9.60 per hour.

5.1.6. Work compensation in sectors similar to non-remunerated work

In order to establish the value of the non-remunerated work which is performed in households, there are two particularly im-

portant groups: the group of all workers, and the group of the sectors most similar to domestic work (household employees, etc.). The first group is useful in discussing the opportunity cost for members of the household entailed in being excluded from the labour market, as well as the lost earnings which accumulate during the period of such exclusion. The second group is useful in the discussion about the cost of replacement of the services of cleaning, cooking, and companionship which are offered in households.

The cost of replacement in domestic work is heterogeneous when broken down into activities, and reflects the peculiarities of the productive structure and the local labour market. International comparison is difficult because each productive structure is different. For example, in Mexico, the estimated hourly pay is almost four times greater depending on whether it is the least valued domestic work (contributing to agricultural and pastoral earnings, Pesos 6.67 per hour), or the most valued activity (looking after children, Pesos 23.33 per hour). The activities of cleaning (Pesos 12.08) are valued at almost one third higher than the activities of cooking (Pesos 9.46), and those of household management (Pesos 23.26) are valued below caring for children. In other countries, such as Spain, the assignment of value would have a different ranking not only because of the different productive structure of the households, but also because of the different structure of the labour market to which the majority of analysts refer when adopting reference prices (Pedrero 2008).

There is debate as to whether gross or net figures should be used when assigning value to non-remunerated work. The *net wage* is what remains after the payment of taxes and Social Security; the amount which directly reaches the worker's pocket. Table 5.3 permits a comparison between the composition of wages overall in the CNAE-09 job classification and the division closest to caring as domestic work (classification no. 87: Assistance in residential establishments). In both, the proportion of the ordinary wage cost out of the total labour cost is close to 63%. If the ordinary wage which reached the worker is taken as the basis for the calculation of the value of non-remunerated work, this has to be increased by 58.73% in order to estimate the market value, or the labour cost.

TABLE 5.3: The components of the labour cost
(in Euros and percentages)

	All CNAE divisions		Assistance in residential care homes		Percentage B over A
	A		B		C
Total Cost	2,548	100.0	1,780	100.0	69.9
Total wage cost	1,892	74.3	1,342	75.4	70.9
Ordinary wage cost	1,607	63.1	1,120	62.9	69.7
Other costs	656	25.7	438	24.6	66.9
Cost of non-wage receipts	110	4.3	39	2.2	35.4
Cost per mandatory contributions	564	22.1	420	23.6	74.5
Social Security benefits and allowances	19	0.7	21	1.2	110.5

Source: Prepared by M.A. Durán using data from the Quarterly Labour Cost Survey (ETCL), 2nd Quarter 2009.

If the value of the non-remunerated work in the household is established by equating it with that of workers who provide assistance in residential establishments, the monthly average is € 1,780. If it is equated with the average cost of all workers, it is € 2,547 (2009).

5.2. The basic substitution cost, according to the Time Use Survey (CSIC 2009)

5.2.1. The cost of paid care for children

The market price of care is not a matter which appears in the communications media, and it does not generate news. According to the referenced survey, the cost of childcare was estimated at € 9.20 per hour in Spain in 2009, without specifying more details as to the type of carer responsible for carrying out the task (Table 5.4). In the majority of households there are no children, and in the majority of households which do have children this service is not used, and therefore the proportion of those who do not know and those who do not answer is high (60.1%).

TABLE 5.4: Estimate of the cost of child care, by gender
(percentage of responses)

	Total	Men	Women
A Less than € 4 per hour	0.7	0.6	0.9
B From € 4 to 7 per hour	10.1	11.0	9.2
C From € 8 to 10 per hour	18.5	17.0	19.9
D From € 11 to 13 per hour	6.8	6.6	7.1
E From € 14 to 16 per hour	2.7	2.8	2.6
F More than € 16 per hour	1.0	0.7	1.2
G Doesn't know/Doesn't answer	60.1	61.2	59.1
Average* estimate in Euros	9.2	9.1	9.3

* The average was obtained using the following scale: A=4; B=6; C=9; D=12; E=15; F=16. Those not responding were not included.

Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

Both the averages and the distribution between the intervals are very similar for men and women (Table 5.5).

There is dispersion in the responses, although they concentrate around the interval of € 8 to € 10 per hour. Virtually none of those interviewed indicated a price below € 5 per hour, and on the other hand there is a visible number, although a minority, of those who estimate the cost at more than € 14 per hour. The survey does not tell us the degree of specialisation or the circumstances which each person interviewed takes as their reference, but it does give a good idea of the overall cost of the services which are provided for the infant population. If a price is estimated for a carer who takes care of the child or children for a whole month, the cost most frequently indicated is between € 600 and € 900, followed by the range of € 900 to € 1,200. The average is found to be € 1,162 per month. The survey does not offer any disaggregated information on the total cost, the wage cost, Social Security, and payments in kind, nor about holiday payments or the 13th month payment, nor about the working hours. It is an overall estimate of what can be assumed to be the most common case in hiring by the month, which is full-time. The average detected is 60% higher than the basis for contributions established

TABLE 5.5: The cost of child care, by socio-economic status and occupation
(percentage)

	High	Medium	Low	Unemployed	Housewife	Retired	Student	Other
A Less than € 4 per hour	0.0	0.0	0.8	1.6	1.9	0.4	0.0	0.0
B From € 4 to 7 per hour	14.0	8.1	14.6	11.8	10.8	6.6	13.3	0.0
C From € 8 to 10 per hour	23.1	15.3	22.3	19.8	21.7	16.2	16.7	12.5
D From € 11 to 13 per hour	16.7	9.8	3.8	7.0	5.1	3.5	5.0	12.5
E From € 14 to 16 per hour	2.6	3.8	2.3	0.5	5.1	1.3	8.3	0.0
F More than € 16 per hour	1.3	0.9	1.5	0.5	1.3	0.9	1.7	0.0
G Doesn't know/ Doesn't answer	42.3	62.1	54.6	58.8	54.1	71.2	55.0	75.0
Average*	9.6	9.9	8.7	8.6	9.3	9.1	9.8	10.5

* The average was obtained using the following scale: A=4; B=6; C=9; D=12; E=15; F=16. Those not responding were not included.

Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

by the Ministry of Labour in 2009 for household employees and other categories of work in the lowest classified group (€ 728).

The estimate is slightly higher in groups which are more likely to use the service of remunerated care, such as those between the ages of thirty and forty-nine years old and those of a medium and high socioeconomic status (€ 9.90 and € 9.60 per hour, respectively).

5.2.2. The cost of remunerated care for dependent elderly people

According to those interviewed, the average is € 10.60 per hour, although the most frequently quoted interval is that between € 8 and € 10 per hour (Table 5.6).

The most frequent estimate of the monthly cost is that between € 900 and € 1,200 (Table 5.7), also higher than that for childcare. The estimated average monthly cost is € 1,149.70.

TABLE 5.6: Cost per hour of care for dependent adults, by gender
(percentage)

	Total	Men	Women
A Less than € 4 per hour	0.3	0.2	0.4
B From € 4 to 7 per hour	5.5	6.2	4.9
C From € 8 to 10 per hour	14.2	12.5	15.7
D From € 11 to 13 per hour	10.3	11.2	9.3
E From € 14 to 16 per hour	4.6	4.9	4.4
F More than € 16 per hour	2.4	1.3	3.4
G Doesn't know/Doesn't answer	62.8	63.7	61.9
Average* (Euros)	10.6	10.4	10.6

* The average was obtained using the following scale: A=4; B=6; C=9; D=12; E=15; F=16. Those not responding were not included.

Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

TABLE 5.7: Monthly cost of care for dependent adults, by gender
(percentage)

	Total	Men	Women
A From € 301 to 600	1.5	1.7	1.4
B From € 601 to 900	7.2	7.1	7.2
C From € 901 to 1,200	12.4	12.5	12.2
D From € 1,201 to 1,500	7.3	7.9	6.7
E From € 1,501 to 2,000	3.5	3.1	3.9
F From € 2,001 to 3,000	1.1	1.3	0.9
G Doesn't know/Doesn't answer	67.1	66.5	67.7
Average* (Euros)	1,149.7	1,150.9	1,144.3

* The average was obtained using the following scale: A=450; B=750; C=1,050; D=1,350; E=1,750; F=2,500. Those not responding were not included.

Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

5.2.3. The cost of remunerated care in non-subsidised care homes

The demand for places in public or subsidised care homes is much greater than the offer, and it is fairly improbable that families will obtain a place immediately. The real cost of a place in these centres is high, but it is paid for out of general taxes. Frequently, the beneficiaries of the service only know and are aware of the cost of their own personal contribution to covering the costs. Nor is there an exact correlation between the cost incurred by the dependent person and what their family pay in many private care homes, because the rating system, donations, and business profits make it invisible. The referenced survey does not offer an approximation to the real cost of the service, which only the institutions themselves could determine, but to the price at which it is offered to the market. The services offered by care homes are heterogeneous in type, quantity, and quality and the needs of different types of dependent persons are also different. Therefore, the figures shown below must be considered to be a very general approximation, and not a breakdown, as is appropriate for non-specialist public opinion. 27.5% of those interviewed did not answer this question, because they lacked any grounds for an answer (Table 5.8).

TABLE 5.8: **Estimated cost of non-subsidised care homes for dependents, by gender of those interviewed**
(percentage)

	Total	Men	Women
A Less than € 600	2.9	3.0	2.8
B From € 600 to 1,200	16.6	16.9	16.4
C From € 1,200 to 1,800	29.9	31.6	28.2
D From € 1,800 to 2,400	18.0	17.0	18.9
E More than € 2,400	5.1	3.9	6.2
F Doesn't know/Doesn't answer	27.5	27.5	27.5
Average* (Euros)	1,538.9	1,509.9	1,562.9

* The average was obtained using the following scale: A=600; B=900; C=1,500; D=2,100; E=2,400. Those not responding were not included.

Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

Among those who answered the question, the most frequent response is to locate the monthly costs between € 1,200 and € 1,800 (29.9%), with the remainder spread fairly symmetrically between those assigning higher and lower costs. The average was found to be € 1,517 per month. 5.1% estimated that the monthly cost was more than € 2,400. The estimates made by women were 4% higher than those made by men, probably because they have more information. There was only a 14% difference depending on the employment situation of those interviewed, with the minimum estimate made by students and the maximum made by those in full-time employment, closely followed by the retired.

Care homes not only provide care services, but also accommodation, upkeep, and at least some healthcare. The timing of care coverage is more extensive than that normally provided by domestic carers (including nights, public holidays, holidays, and so on) and the price is comparatively low because they can make use of economies of scale, simultaneously producing services of direct care and of availability for a number of different dependent people. The average price per resident estimated by those interviewed is equivalent to the estimated cost of 1.33 carers contracted directly by the household itself, and 2.08 household employees with a salary at the base level for Social Security contributions (€ 728 per month).

5.2.4. The remuneration of immigrant carers

Hiring paid foreign carers to attend to dependent family members is a practice which is becoming more frequent, although still only for a minority of families. Although in principle their pay has to be identical to that of native workers, in practice this is a sector of employment with low earnings, and may be taken as a minimum benchmark below which there will be no workers prepared to take up these jobs. 5.2% of those interviewed responded that in their close family recourse had been made to this type of carer on some occasion or other. This does not seem to be a very high proportion, but it is twice that of the use of foreign carers for children. Currently, carers who have accommodation at their workplace are almost exclusively foreign, and this type of internal carer is more common in the case of the elderly than in the case of children.

Women report this practice with a slightly higher frequency than men. The highest frequency occurs among those interviewed aged between 50 and 64 years old (7.6%). As might be expected, with low socioeconomic status, this type of care is used less (2.3%) than in the other levels of socioeconomic status.

If any family member were to suffer a situation of dependence, the balance of income and expenses of the family would suffer. This is the opinion of 80% of those interviewed, who are equally split between those who believe that the impact on the household economy would be intense or slight. Very few believe that the impact would be compensated by the institutions (1.7%), by other members of the family (2.8%), or by the dependent family members themselves (4.0%).

There are no major differences between the various different social groups in the estimation of the economic impact of dependence on households. Dependence affects families differently, depending on the socioeconomic role formerly performed by the dependent person, and on the roles played by the potential carers. Some are affected above all by the reduction of income or of the time resources available, and others by the increased cost of dependence. The social group which most highlights the intensity of the impact on the family economy is that belonging to the low socioeconomic level (45%).

This opinion is also high among the age group from 30 to 49 years old, when it is common for women to join the labour market. The position of retired people and those older than 65 years of age is rather different from that of other social groups, precisely because they assert with greater frequency that it would not affect their expenses or their income (Table 5.9).

Not being in the labour market is probably the explanation of why some people do not expect there to be an impact on their family economy, precisely because they cannot lose what they have already lost; on the other hand, making use of institutions or paid care to attend to the needs generated by dependence is not part of their expectations.

Although the differences in expectations between men and women are very small, men highlight somewhat more the intensity of the impact, while women refer with a slightly greater frequency

TABLE 5.9: **The economic impact of care for dependents, by ages of those interviewed**

	Total	18 to 29 years old	30 to 49 years old	50 to 64 years old	65 years of age and above
Total	1,101	254	404	213	229
Would not affect expenditure or income	7.2	4.3	5.9	6.1	13.1
Would make it rather worse	39.3	39.4	39.5	42.3	36.2
Would make it much worse	38.1	37.4	41.7	37.6	33.2
Would not affect, dependent would compensate	4.0	5.5	2.7	3.3	5.2
Would not affect, family would compensate	2.8	3.1	3.7	1.4	2.2
Would not affect, institutions would compensate	1.7	0.8	2.0	1.9	2.2
Doesn't know/Doesn't answer	6.9	9.4	4.4	7.5	7.9

Source: Prepared by M.A. Durán using data from the CSIC Time Use Survey, Spain 2009.

to financial compensation from the dependent person themselves or from other family members.

With respect to measures to cope with the possible impact, the cited survey only makes explicit reference to one, namely *dependence insurance*. As has already been pointed out, having severely dependent adults in the close family was reported by 11.2% of those interviewed and moderately dependent adults by 14.4%. Nevertheless, dependence insurance is a recent social practice, and today still very much a minority. Only 2.4% of those interviewed have any type of insurance to cover this eventuality. As with any other type of insurance, this practice is more frequent in those of high socioeconomic status (3.4%) than among those of middle socioeconomic status (2.1%), and those of low socioeconomic status (1.5%). Those with the greatest probability of needing it, those over the age of 65 years old, do not enjoy the economic circumstances (a comfortable budget) or the propensity to hire it. Only 0.9% of those older than 65 years of age say that they have this type of service.

5.3. The opportunity cost of being out of the labour market

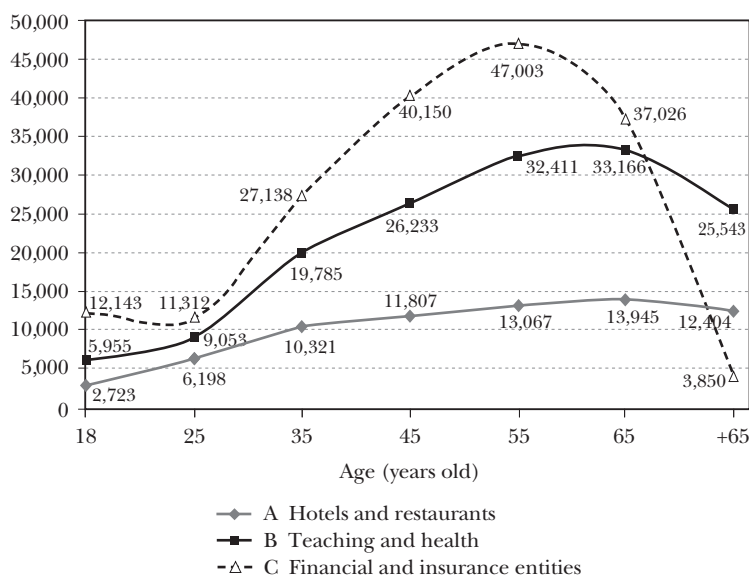
5.3.1. The estimation of income lost by carers. Taxation sources

The best source for the analysis of wage earners incomes in Spain is the statistics in the Taxation Information on the Work and Pensions Market (Información Tributaria sobre el mercado de Trabajo y Pensiones), prepared each year by the State Tax Administration Agency (Agencia Estatal de la Administración Tributaria – AEAT). The information is presented both from the perspective of the employing and paying entities and from that of the persons whose tax is withheld, which is to say, the persons in receipt of wages or salaries, pensions, and unemployment benefits. It is based on the tax return (Form no. 190) submitted by all individuals and legal and other entities, including the Public Administration, which are required to withhold personal income tax (IRPF). It does not offer any information about the self-employed or business owners, nor does it say anything about household employees who are not subject to the withholding tax under the IRPF. It refers to the common fiscal territory, and therefore does not include the Basque Country or the Navarre (*Comunidad Foral*), which enjoy their own regional tax regime. Companies which also have operations in the common fiscal territory are required to submit an annual return to both Tax Agency, but the data which is published refers only to the common fiscal territory.

Graph 5.2 shows the average wages and salaries of the three productive sectors by the age of the earners. Line A is relatively flat, and corresponds to workers in the hotel and restaurant sector. This sector is dominated by young entry (20% of earners are between 18 and 25 years of age), low qualifications, and little possibility of financial promotion as an employee throughout the employment cycle. From the age of 65 years old barely any employees remain in the sector.

Line B reflects the possibilities of financial promotion offered in the teaching and health sectors. Jobs which require a medium or high level qualification predominate, and to a large extent are made up of employees of the Public Administration. Access to employment occurs later than in the hotel and restaurant sector, and only

GRAPH 5.2: Average annual pay by age and sector
(in Euros)



Source: Tax Agency Labour Market and Pensions (Mercado de Trabajo y pensiones), 2008.

10% of earners are less than 25 years old. The possibility of promotion is not as high as it may seem, because the average salaries are increased during the central ages because of the late entry to employment of very highly qualified workers (doctors, university teachers, etc.) who obtain their highest remuneration in the last age range, but before 65 years old. Although almost all earners cease working from that age, those older than 65 years old constitute 1% of earners in the sector, and their average salaries are similar to those of the group from 35 to 45 years old.

Line C reflects the employment cycle of earners in the finance and insurance entities sector (graph 5.2). Qualified workers employed in private entities predominate. Entry to employment occurs later than in the previous two sectors, and only 5% of employees are between 18 and 25 years old. Financial promotion is very high considering that they are employed workers. Nevertheless, the employment cycle is very short, and the age of maximum earnings of employees is between 45 and 55 years old. The following age group

(between 55 and 65 years old) loses on average 21% of their remuneration and then leave their jobs from the age of 65 years old⁹⁴.

The fact that they are employees homogenises the earnings of workers, both between the sectors and within each sector. Evidently, the profiles corresponding to the employees as a whole make internal differences invisible, and they do not collect the different degrees of working hours or the non-salary compensation which may accompany the job. The differences are much sharper between businessmen, the self-employed, and professionals than between employees, because the compensation for the job itself and management are added to earnings from invested capital.

Table 5.10 shows salary differences for the year 2007, by age and gender of the employees. The average annual salary overall for all workers was € 18,087. The average salary for men was € 20,750 (115% of the average), while the average for women was € 14,568 (80.5% of the average). The average salary for women was 70% that of the men, but not all of this difference can be attributed to discrimination strictly speaking, because the average working day for the women is shorter.

The wage and salary profiles by age and gender are shown clearly in Graph 5.3, referring to the average annual wages and salaries of all workers together. Nevertheless, it should be pointed out that the average salaries, both for men and for women follow an upwards curve which hits a maximum at the age range of 46-55 years old. At the beginning, up to the age of 26 years old, wages and salaries are very low, and it is difficult for young people to become emancipated from their family in such financial circumstances. Many incomes in this age range come from part-time working and apprenticeships. Between the moment of beginning full-time working (at the age of 26 years old) and the maximum wages and salary income (at approximately 55 years old) there is an average increase in wages and salaries of 45.5%. They remain almost as high in the following age range, and then fall sharply among those who continue working after passing the standard retirement age. The pro-

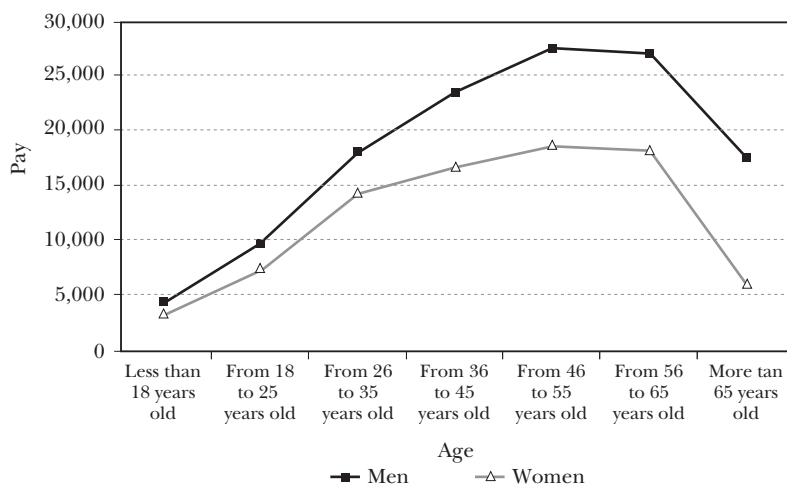
⁹⁴ The data published by the Tax Agency in respect of those over the age of 65 years old in financial and insurance institutions, with an average wage of € 3,850, which is lower than the minimum wage, suggest that this was part time work.

TABLE 5.10: **Pay by age and gender**
(in Euros and percentages)

	A	B	C	D	E	F	G	H	I	J	K	L	M
	TOTAL				MEN				WOMEN				K / G
	Earners	%	Average annual pay	%	Earners	%	Average annual pay	%	Earners	%	Average annual pay	%	
Total	19,309,032	100.0	18,087	100.0	10,990,276	100.0	20,750	100.0	8,318,756	100.0	14,568	100.0	70.21
Less than 18 years of age	170,607	0.9	3,894	21.5	107,972	1.0	4,326	20.8	62,635	0.8	3,150	21.6	72.82
From 18 to 25 years of age	2,827,667	14.6	8,536	47.2	1,540,354	14.0	9,645	46.5	1,287,313	15.5	7,210	49.5	74.75
From 26 to 35 years of age	5,877,298	30.4	16,201	89.6	3,200,799	29.1	17,898	86.3	2,676,499	32.2	14,172	97.3	79.18
From 36 to 45 years of age	5,032,188	26.1	20,415	112.9	2,842,004	25.9	23,384	112.7	2,190,184	26.3	16,561	113.7	70.82
From 46 to 55 years of age	3,541,112	18.3	23,699	131.0	2,076,505	18.9	27,374	131.9	1,464,607	17.6	18,489	126.9	67.54
From 56 to 65 years of age	1,679,593	8.7	24,107	133.3	1,134,116	10.3	26,973	130.0	545,477	6.6	18,148	124.6	67.28
Older than 65 years of age	180,567	0.9	11,487	63.5	88,526	0.8	17,429	84.0	92,041	1.1	5,773	39.6	33.12
Percentage of Older than 65 years of age over 56-65		10.8		47.7		7.8		64.6		16.9		31.8	

Source: State Tax Administration Agency (AEAT) 2007,

GRAPH 5.3: Salaries according to age and gender
(in Euros)



Source: Tax Agency Labour Market and Pensions in the tax sources. 2002-2007 Series. INE 2009.

portion of male wage or salary earners who are older than 65 years old is very low in comparison with the preceding age range (7.8%), because social benefit and legal cover allows/obliges them to leave the employment market.

The employment and earning trajectory of women is similar in outline to that of men, but it has a number of peculiarities in the development of their career. In respect of volume, the number of women earners is only 76% that of the number of male earners. In comparison with men, one quarter of women do not wish to, or are unable to, enter the job market. In respect of age, employment is concentrated rather more in the younger groups, and has a less abrupt end. The number of wage and salary earning women over the age of 65 years old is 16.8% of the preceding age group, precisely because their family/social/regulatory circumstances do not permit them to stop working. With regard to the wages and salaries, women earners are less dispersed by age than men, they vary less from the average for women, because they find it difficult to achieve a good professional career. The average earnings from employment at the age of maximum income is 5.9 times higher than that of those younger than 18 years old, which is a proportion which does not

differ much from the proportion between the earnings of the corresponding groups of men (6.3). The most outstanding point in comparison with men is the very small average wage of women earners older than 65 years of age. Men at this age earn 64.6% of what the group of men from 56 to 65 years old earn, while women earn only 31.8%. The data from the Tax Agency do not record the working hours, which could proportionately be much lower for women than men; however, it leads one to suppose that this group is in general made up largely of women who have to continue working in order to satisfy regulatory requirements such as the number of years of contributions in order to earn retirement rights.

Wages and salaries are not the sole source of income for many earners, although the other sources are usually a small amount in comparison with the earnings from employment. On average, wage earners have 1.41 separate sources of income per person. The number of different sources of income is at a maximum between 18 and 25 years of age, both for men and for women (1.7 incomes per person) and falls slowly until it is close to one source of income (1.10 for men, 1.05 for women). It is probably the lack of, or the low value of, other sources of income because of their low contributions that causes the number of women wage earners over the age of 65 years (92,041) to be greater than that of men of the same age (88,526), in spite of the fact that in the preceding age range they did not even reach one half.

5.3.2. The estimation of income lost by carers, using data from the Living Conditions Survey

The *opportunity cost* is what a worker pays for remaining out of the job market. It is a purely economic concept, which does not include any factors of its opposite, which is the opportunity cost in human terms of remaining out of the home. It is based upon the assumption, which is not always real, that the potential worker could sell all of their working time on the labour market, but decides not to do so. For workers whose employment earnings vary little throughout the employment cycle, the opportunity cost is easy to estimate, because it is similar to the work lost at the present moment. For workers whose employment earnings rise during the employment cycle once corrected for inflation, estimation is more difficult, because

the interruption does not affect only the present but also the future. The variation may follow a continuous or a discontinuous rhythm. The *human capital depreciation rate* is defined as the loss of capacity to obtain earnings by individuals on the basis of their stock of qualifications. It may be due to temporary departures from the job market, physical deterioration, or changes in the economic environment (Arrazola and Hevia 2001, 7). In addition to the level of employment earnings of workers who are in work, when valuing the opportunity cost for those not in the market it is important to understand the conditions of being out of and returning to employment.

Using data from the Living Conditions Survey, INE made an estimate of the average gross wages and salaries in 2008, according to levels of training and gender (Table 5.11). There is a ratio of 169.5% between the highest level of education and the lowest. In wages per hour, the index is very similar (171.4%). According to this source, there is less dispersion among men than among women, because normal full-time working is a homogenising factor. Among women, in addition to the differences in hourly wages (those with the highest level of education earn 187.2% more than those with the lowest) there are the differences in working hours between full- and part-time; while the maximum difference in hourly wages is 187.2%, the difference in monthly salaries reaches 205.4%. Women with higher education earn more per hour and also work more hours per month than those with lower levels of education.

Employment earnings are more heterogeneous by occupation than by level of education. The gross monthly salaries of managers in companies and in the Public Administration are 335.8% those of unqualified workers, a disparity which is moderated in hourly wages (264.9%) because the average working hours are longer (Table 5.12).

For salaried workers who occupy management positions, being out of the job market is a loss which can be quantified as three times higher than that of unqualified workers. Although this is not the only factor which has to be taken into account (the fact that it is impossible for workers on the lowest incomes to reduce their working hours because they do not cover the costs of mere subsistence, prior savings in the groups with higher income, etc.), it has to be remembered when predicting the effect of the incentives offered to stop working, for example, to take charge of dependent relatives.

TABLE 5.11: Indices of gross monthly salaries and hourly wages in 2008 and 2009, by level of education and gender
(in Euros and percentages)

	Total Persons (in thousands)		Monthly salary index percentage of total		Hourly wage index percentage of total	
	2008	2009	2008	2009	2008	2009
Both genders						
Total	16,504.4	15,278.1	100.0	100.0	100.0	100.0
Primary education or lower	2,340.4	1,692.9	75.3	71.5	74.5	72.3
Secondary education, first stage	3,810.9	3,730.3	79.0	77.1	78.0	75.8
Secondary education, second stage	4,066.7	3,724.9	91.6	89.2	92.4	88.6
Higher education	6,265.7	6,120.5	127.6	128.4	127.7	128.5
Not stated	20.7	9.4	124.4	57.2	106.0	60.4
Percentage of highest pay over lowest pay			169.5	179.6	171.4	177.7
Men						
Total	9,220.9	8,383.7	112.3	111.6	105.8	104.9
Primary education or lower	1,528.4	1,033.2	86.6	84.5	80.4	77.5
Secondary education, first stage	2,333.8	2,314.2	91.6	89.2	84.5	82.1
Secondary education, second stage	2,175.8	1,969.1	106.6	104.1	101.9	97.9
Higher education	3,169.2	3,062.8	143.9	142.3	136.4	135.2
Not stated	13.8	4.3	154.1	62.4	128.2	51.0
Percentage of highest pay over lowest pay			166.2	168.4	169.7	174.5
Women						
Total	7,283.5	6,894.5	84.6	85.9	92.7	94.1
Primary education or lower	812.0	659.7	54.1	51.3	63.5	63.7
Secondary education, first stage	1,477.1	1,416.0	59.0	57.5	67.8	65.7
Secondary education, second stage	1,890.9	1,755.8	74.3	72.4	81.5	78.4
Higher education	3,096.6	3,057.8	111.1	114.4	118.9	122.0
Not stated	6.9	5.1	65.7	52.9	58.7	72.8
Percentage of highest pay over lowest pay			205.4	223.0	187.2	191.5

Source: Living Conditions Survey, 2009.

TABLE 5.12: Indices of gross monthly salaries and hourly wages in 2008 and 2009, by type of occupation
(in Euros and percentages)

	Total Persons (in thousands)		Monthly index percentage of total		Hourly wage index percentage of total	
	2008	2009	2008	2009	2008	2009
Total	16,504.4	15,278.1	100.0	100.0	100.0	100.0
Managers in companies and in the Public Administration	306.2	287.1	211.9	207.4	182.5	180.2
Scientific and intellectual technical and professional staff	2,458.0	2,503.4	151.6	153.4	158.1	157.7
Technical and professional support staff	2,004.1	1,839.3	116.9	116.9	115.4	112.7
Administrative type employees	2,488.2	2,306.6	96.0	94.9	97.8	95.6
Services workers	2,615.7	2,384.1	75.6	74.8	77.8	74.9
Qualified workers in agriculture and fisheries	179.5	188.3	75.3	71.6	69.9	66.8
Qualified craftsmen and workers in manufacturing industries	2,463.3	1,982.8	92.6	91.2	84.5	84.2
Facilities and machinery operators and assemblers	1,227.9	1,130.7	99.4	94.8	90.8	86.4
Unskilled workers	2,609.2	2,241.4	63.1	61.7	68.9	67.5
Not stated (including Armed Services personnel)	152.3	414.5	112.3	74.7	113.0	110.3
Percentage of highest pay over lowest pay			335.8	336.1	264.9	269.8

Source: Living Conditions Survey, 2009.

By nationality, the ratio of the gross monthly earnings against the total is 101.8 for Spanish nationals, 90.6 for immigrants from Europe, and 69.7 for all other immigrants.

5.3.3. The loss of other financial and social rights

At an advanced age, women have a greater probability of falling into poverty than men, because their working life has been shorter and they have made smaller contributions, or have not made any

contributions. The pension systems which require prolonged periods of contributions or later retirement cause greater difficulties for women than for men. The same thing is true if they are proportional to the levels of earnings or the estimated survival periods at the moment of retirement, because women live longer (Salvador 2007).

The opportunity cost occurs at all professional levels, because throughout the labour market the same concept predominates, that of the worker as an individual sustained by a household which provides them with attention and basic care. For example, the European Molecular Biology Organization (EMBO) has called attention to the need for a change in the model of the scientific career in order to permit all researchers to reconcile their family life with their professional life^{95,96}.

5.4. The displacement of non-remunerated work to those excluded from the labour market

Although it might appear logical that in circumstances of the distribution of non-remunerated work the working assumption should be that would fall on the population of a potentially working age, in social practice it is common for it to be transferred to the population not of potentially working age, that is to say on children and the elderly, principally on women. Traditionally, children have taken care of a multitude of tasks with little or no remuneration in order to free up time for the adults for other better paid or more difficult tasks, a practice which is prohibited nowadays by international law in the case of paid work. In social practice, non-remunerated work in households is transferred to the people who are excluded from the labour market. This happens not only if they are

⁹⁵ EMBO cites a study on the mobility of researchers which shows that when a change of location is necessary for the spouse's professional reasons women do so more easily than men. 51% of women researchers, as against 18% of men, say that they went to a different location because it was good for their partner.

⁹⁶ "Help is not enough, the scientific culture has to change and accept the needs of women and men who wish to combine family and a scientific career" (EMBO 2007, 977: 987).

directly or indirectly removed of their employment in order to take up non-remunerated work in households (for example, by means of a prohibition on access to training, or a prohibition on married women or in some ethnic or political minorities working) but also in the case of people already removed (pensioners, the retired, of the unemployed). A pensioner or a retired person who takes on non-remunerated work generates well-being in their own household. Moreover, they do not pay the opportunity cost which is incurred by people who could enter the job market but who do not do so in order to take on non-remunerated domestic work. The unemployed apparently do not pay any opportunity cost, but they pay it indirectly to the extent that they are unable to devote the time to looking for work.

The increase in the elderly population and the improvement in conditions of health, together with the improvement in the cover provided by the pensions system, have converted the elderly into an economic power of the first magnitude, not only in respect of the market (owners, purchasers of goods and services, depositors of assets), but also in the non-monetarised economy which is limited to households. In Spain, where the public services for the care of infants are not sufficient to meet the needs of the population and private services are beyond reach because of their price, grandparents play an important role in childcare, and make it possible for an intermediate generation to take up employment. According to the Elderly Persons Living Conditions Survey (CIS 2006), 22.6% of those over the age of 65 years old who have children help to take care of their grandchildren. This proportion is 39.5% in the group from 65 to 69 years old, and falls very rapidly with age. Among those who provide help, it is most frequent for them to do so every day.

Usually, the *substitution cost* is found by taking the average earnings of workers in the labour market as the basis. In Table 5.13 we show data on compensation received by earners from employment, pensioners, and the unemployed. The average number of sources of income per person among earners from employment is 1.41. The first three categories in the figure refer to those who earn from only one type of source, although they may receive from various different sources of the same type (multiple employment, etc.). The four re-

TABLE 5.13: **Compensation of earners, pensioners, and the unemployed, 2007-2008**
(in Euros and percentages)

	2007			2008			% 2008 over 2007
	No. of staff	%	Average annual compensation	No. of staff	%	Average annual compensation	
Total	27,094,749	100.00	16,572	27,325,248	100.00	17,544	105.87
Earners	15,296,210	56.45	20,024	14,437,863	52.84	21,661	108.18
Pensioners	7,001,328	25.84	11,023	7,111,670	26.03	11,909	108.04
Unemployed	662,718	2.45	4,586	763,080	2.79	4,664	101.70
Earners and pensioners	1,213,515	4.48	21,957	1,289,423	4.72	24,002	109.31
Earners and unemployed	2,563,085	9.46	12,046	3,286,709	12.03	12,541	104.11
Pensioners and unemployed	121,671	0.45	13,682	139,871	0.51	13,615	99.51
Earners, unemployed, and pensioners	236,222	0.87	14,058	296,632	1.09	14,565	103.61

Source: Prepared by M.A. Durán, using data from the Tax Agency "Labour Market and Pensions 2007 and 2008".

maintaining categories refer to those who receive earnings from multiple income sources.

The professional circumstances of workers changes over time and some workers maintain several different types of sources of income simultaneously, or receive from several difference types of earnings successively.

The sources of income refer to receipts under this heading throughout the year, but many sources of income were only received for a period shorter than one year. The economic crisis commenced in the middle of 2007, and it is striking that during that year there were 662,000 people whose only source of income was unemployment benefit, while more than 2.5 million received income from earnings and unemployment benefit. To the extent that workers remain in unemployment for a long period, these figures change relative weight in the total received from all sources of income⁹⁷. Table 5.14 shows the average annual compensation by regional autonomous community.

If the domestic work is carried out by a paid help who has had to give up their employment for this reason, then the average loss amounts to € 20,024 per year. If this is performed by a pensioner, their income under this heading is on average € 11,023 per year, but occupation in domestic work does not entail the risk of losing the benefit, which would happen if they were to be employed on a paid basis in any other occupation. If the person carrying out domestic work is an unemployed person, here too this does not entail an immediate risk of the loss of the unemployment benefit, although it does reduce their probability of finding a new job.

In recent years, the redistribution of internal work household has acquired a new international dimension through migration. Young women or women of central ages from developing regions or countries emigrate towards more attractive labour markets, while other women from the same family take responsibility for the domestic work and attending to dependent relatives (children, the sick and the elderly) who remain in their original household.

⁹⁷ The Tax Agency web portal (AEAT) had not published the data for 2008 and 2009 by November 2009.

TABLE 5.14: **Average annual compensation by Autonomous Community**
(in Euros and percentages)

	A		B		C		D		Percentage		
	Total	%	Earners	%	Pensioners	%	Unemployed	%	B/A	C/B	D/B
Total	16,572	100.00	20,024	100.00	11,023	100.00	4,586	100.00	120.83	55.05	22.90
Andalusia	14,135	85.29	17,482	87.31	10,247	92.96	4,219	92.00	123.68	58.61	24.13
Asturias (Principality of)	17,431	105.18	20,448	102.12	13,604	123.41	4,451	97.06	117.31	66.53	21.77
Balearic Islands	16,113	97.23	19,312	96.44	10,470	94.98	4,409	96.14	119.85	54.21	22.83
Canary Islands	14,822	89.44	17,426	87.03	10,428	94.60	4,342	94.68	117.57	59.84	24.92
Cantabria	16,837	101.60	20,133	100.54	11,809	107.13	4,395	95.84	119.58	58.65	21.83
Castilla y León	15,841	95.59	19,126	95.52	10,796	97.94	4,345	94.74	120.74	56.45	22.72
Castilla-La Mancha	14,699	88.70	17,615	87.97	9,671	87.73	4,117	89.77	119.84	54.90	23.37
Catalonia	18,264	110.21	21,984	109.79	11,489	104.23	5,381	117.34	120.37	52.26	24.48
Valencia											
(Community of)	15,457	93.27	18,403	91.90	10,214	92.66	4,554	99.30	119.06	55.50	24.75
Extremadura	12,883	77.74	16,643	83.12	9,186	83.33	3,881	84.63	129.19	55.19	23.32
Galicia	1,442	8.70	18,341	91.60	9,424	85.49	4,237	92.39	127.19	51.38	23.10
Madrid (Community of)	21,302	128.54	24,556	122.63	13,787	125.07	5,393	117.60	115.28	56.15	21.96
Murcia (Community of)	14,587	88.02	16,950	84.65	10,210	92.62	4,279	93.31	116.20	60.24	25.24
La Rioja	16,290	98.30	19,531	97.54	10,539	95.61	4,915	107.17	119.90	53.96	25.17
Ceuta	18,943	114.31	22,764	113.68	14,010	127.10	3,787	82.58	120.17	61.54	16.64
Melilla	18,641	112.48	22,327	111.50	13,404	121.60	3,732	81.38	119.77	60.03	16.72

Source: Prepared by M.A. Durán, using data from the Tax Agency "Labour Market and Pensions 2007 and 2008".

5.5. Satellite accounts: a necessary bridge between heterogeneous economic systems

When two different economic systems interact, it is necessary to have an integrating vision which can highlight the exchanges between them and the manner in which each system is affected by the other. The work put into production for the market falls into a long, rich, and powerful accounting tradition, the highest expression of which is the System of National Accounts (SNA). Non-monetarised work lacks a similar accounting and research tradition, and the SNA makes it invisible. There is no shortage of proposals to maintain research on both systems which turn their backs and mutually ignore each other, but the proposals which advocate for integration are more convincing. It is obvious that this would not be a merger of equals, because the productive system for the market is well understood, and has measured almost everything, while almost nothing is known about non-remunerated work; but in the process of integration the important thing is the objective and not the resources which are already available to carry it out.

Non-remunerated work occurs principally in households, and in non-profit organisations (volunteers). Both types of activity are in a struggle to evolve their own accounting systems, which are exercises in expression synthesised from the flow of resources between sub-sectors in each system. In order to achieve a summary table of the flows it is necessary to have theoretical clarity (the framework for classification and operation) and systematic observations (accessible periodic statistics), both of which are conditions which have yet to be established in the case of non-remunerated work, although work to achieve this is advancing at a good rate in many countries. Nevertheless, the technical difficulties which are posed by the construction of accounts for non-remunerated work or of households are relatively easy to resolve when they are compared with the difficulties involved in integration with the monetarised economy, reported in the SNA. The principal problem is finding a unit of accounting which is common to both systems or, at least, a system for converting between one and the other. Attempts to use working hours as the common element in the two systems do in fact serve to establish a first level of comparison, but its scope is very limited. Capital, technology, and

organisation capacity play an important role in the SNA; work is an important element in production, but not the only one, nor in certain cases is it even the most important. The SNA makes use of a universal equalising element, which is money, and in the long run all of the magnitudes are reduced to this. Can all non-remunerated activities be forced to be recoded in monetary terms, if what precisely characterises them is that they remain isolated from money?

The answer is not easy, and for certain purposes the insistence on valuation in monetary terms of what would not be done for money's sake would lack any sense. However, the interaction between the monetarised and non-monetarised economic systems is a fact, and so are the constant transfers between one system and the other. A sizeable part of public policies (education, transport, health, food, and housing) generate exchanges between monetarised and non-monetarised resources, which have major consequences for the population, and it is essential to understand them, to measure them, and to forecast them. Not only in the case of transfers of activities traditionally carried out by households to the public services and companies, but also in the case of the return of activities by the market and the State to families and individual members of the public. There is no other remedy but to find a common accounting unit for these transfers, and for the moment, no-one has found a better solution than to assign an exchange value — in short, a price — to the activities which are carried on outside the market. The *satellite accounts* are an accounting compromise solution. They are located outside the main body of the SNA in order not to disturb it, but they use a language which is sufficiently related for them to be understood. In spite of the fact that half a century has already elapsed since the pioneering attempts to present satellite accounts for non-remunerated work (Durán 1978, 2000, 2007; Eisner 1989; Ironmonger 2001, 2009, 6: 240-268)⁹⁸ and that the number of ac-

⁹⁸ After a sophisticated analysis disaggregating domestic work by tasks and assigning a value to each of them, the authors estimate that the average value of non-remunerated work in Australia is \$ 29.91 per hour, while the average value per hour worked in the labour market is \$ 30.64 (op. cit. p. 264). These are extraordinarily similar figures, which would, in our opinion, support the simplification of the calculation in countries which lack time use surveys if the average value per hour worked in the labour market were assigned to domestic work.

counts has accumulated over the last decade, almost everything still remains to be done in this field of research. This is not surprising when it is remembered that the history of the SNA started in the 20th Century for the purpose of measuring national wealth, and resources of every kind have been focussed on this goal, infinitely more than those which have up until now been achieved by accounting for non-remunerated work. Sooner or later, the economic analysis will have to open up and make room for this new integrating perspective, or it will consolidate as a new field of investigation, perhaps under a new name and under the aegis of a new discipline.

The assignment of value or a price to non-remunerated work is a task which belongs as much to politics as to economics. The recommendations of some experts, among others, those of the United Nations, are that domestic work should be given a similar value to that of a household employee (calling it “*general work*”), which has caused a highly negative reaction among the very social movements which call for it to be measured. If the women’s social movements ask for it to be measured, it is, precisely, because there is a clear awareness of its high cost in terms of opportunity cost; it comes from a claim for what it costs, and not what it is worth in market terms. Accepting this premise is equivalent to doing precisely the opposite of what is intended, and reduces the entire female population to the lowest level of the remunerated employment market. Out of respect for an authority of the prestige and power of the United Nations, it might be appropriate to follow their criteria for the purpose of achieving a minimum international agreement, not forgetting that the true objective of the satellite accounts for non-remunerated work is to contribute to a new manner of division of the care workload, instead of institutionalising it. Following the proposal of Eurostat, on the basis of the data from the Time Use Survey 2002-2003 by INE it is estimated that in the year 2002 non-remunerated work in Spain added a value of 60.71% to GDP (Durán 2006)⁹⁹. If other sources from the CSIC are used, which offer higher results for time devoted to care, the proportion is even greater. In the period of economic expansion up to 2007, GDP increased, and the time de-

⁹⁹ Please see references to the estimates for the Madrid Autonomous Community and other autonomous communities.

voted to non-remunerated work decreased; but it is foreseeable that as a consequence of the crisis it has climbed once again. There are still no new surveys available for the period of the crisis, although it is foreseeable that INE will publish the results of their second Time Use Survey in 2011, the field work and advance data having been published in 2010.

6. Import/export: the migration of remunerated work

6.1. Between fine words and the measurement of migratory flows¹⁰⁰

6.1.1. The Universal Declaration of Human Rights

The Universal Declaration of Human Rights was approved by the Assembly of the United Nations in 1948, and has since then been operational in all countries as a benchmark or a guide to good conduct. Some of the articles in the Declaration make references to work and the free movement of workers, but sixty years later, the gap between such promising words and social practice continues to be insurmountable.

Article 1 proclaims that all human beings are born free and equal in dignity and rights; Article 13 states that “everyone has the right to freedom of movement and residence within the borders of each state”. Article 23.1 states that “everyone has the right to work, to free choice of employment, to just and favourable conditions of work, and to protection against unemployment”. And in accordance with point 3 of the same article, “everyone who works has the right to just and favourable remuneration ensuring for himself and his family an existence worthy of human dignity, and supplemented if necessary, by other means of social protection”.

¹⁰⁰ In the preparation of this chapter the collaboration of the political scientist, Ana Barbero Sampedro has been decisive. I am grateful for her support and her knowledge of international volunteer organisations.

The legislation of the majority of countries is inspired by or expressly recognises the Universal Declaration; the Spanish Constitution of 1978 is no exception. The beginning of the Preamble declares that the basic values of the Constitution are freedom, justice, equality, and political pluralism, and Article 10.2 recognises that the law in respect of fundamental rights and freedoms “shall be interpreted in accordance with the Universal Declaration of Human Rights”. Nevertheless, implicitly, and sometimes explicitly, the person to whom the Constitution refers as the holder of rights is the Spanish citizen (Article 14) and not the citizens of other countries. Both the Universal Declaration of Human Rights and the Spanish Constitution reveal the values of the times in which they were drafted, and do not refer expressly to the recognition of non-remunerated work, apart from general references to the family. However, this is something which is now beginning to be seen in recent texts from the International Labour Organisation.

The drafting of Article 13 of the Universal Declaration is sufficiently open and ambiguous to be able to highlight the rights of those who wish to change their country without awarding the parallel obligation to accept them in any specific entity. Nor does Article 23.1 indicate who has the obligation to provide equitable and satisfactory work to those who wish to be workers, nor the resources which could be employed for this purpose. It implicitly acknowledges that this will not always be achieved, given that immediately afterwards it makes a reference to protection against unemployment. Work is interpreted as a means of obtaining individual and family resources (Article 23.3); and the text acknowledges that equitable and satisfactory remuneration will not always be guaranteed, and therefore refers to it being supplemented by other social agents “whenever it may be necessary”. In short, almost without mentioning it, the declaration draws a complex panorama in which territories are not stable, workers form a part of family networks and employment relations are carried on within a framework of other institutions and other social agents which are required to take action in order to supplement them.

Within the openly programmatic nature of the Universal Declaration, Article 22 sets out a few accents of realism. While it does declare that “Everyone as a member of society, has the right to Social

Security and is entitled to realisation through national effort and international co-operation... of the economic, social, and cultural rights indispensable for his dignity and the free development of his personality”, it inserts a brief reference in the middle of this paragraph to the limits within which it may be realised “in accordance with the organisation and resources of each State”.

Employment driven migrations, not to mention those caused by warfare and natural disasters, are the best proof that in some places workers do not consider their conditions of work to be satisfactory, or at least not to be as satisfactory as they could be if they were to emigrate to other places and other markets.

One special type of migrant is the refugee or political asylum seeker. In the United Nations Convention on the Status of Refugees of 1951, *refugees* are defined as “those persons who legally flee from their country owing to well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion”. The number of refugees and internal displaced persons throughout the world in 2007 reached the record number of 37.4 million according to the report represented by the UN High Commissioner for Refugees in London, with information on 150 countries. Of those, 11.4 million were refugees (people who have crossed international borders fleeing from persecution) and 26 million internal displaced persons (those obliged to leave their homes, but within their own country).

The principal cause of this increase is to be found in armed conflict, but also in environmental deterioration owing to climate change, and in competition for resources which are becoming scarcer every day. Today, 7% of migrants in the world are refugees or asylum seekers, which adds up to as large a population (13.5 million people) as a medium sized nation.

Contrary to a widely held view, refugees and asylum seekers make up a proportion five times higher in respect of the population of low income countries (14.3%) than in the countries of the OECD. The Middle East and North Africa have the highest concentration of refugees in comparison with their population; in some countries it reaches 60% (World Bank 2008). International displacements of frontiers sometimes convert a part of the population into migrants without them even moving home. With respect to access to the em-

ployment market, the situation of refugees is particularly complicated; they need it, but nevertheless they are frequently unable to gain access to it because of their temporary circumstances, lack of informal integration networks, and difficulties of an administrative and legal nature.

6.1.2. Migratory flows, balances, and stocks

To start with a spectacular piece of data, the Population Reference Bureau estimates that by 2020 one third of all the children born in the United States will live in an immigrant household, which provides a counterweight to the idea that migrations are easily regulated by States (Mather 2010)¹⁰¹. All societies attempt to direct displacements within their territory in one way or another, in some cases promoting mobility, and in others restricting it, but none is capable of fully imposing on its population, and other populations, the territorial allegiance which their government may have wished. A profound mark in the collective memory has been left by massive displacements, such as exoduses, expulsions, and colonisations, particularly among those groups who are affected by the prohibition/obligation to enter or leave as a result of their personal characteristics (citizenship, ethnicity, ideology, religious beliefs, financial capacity, employment qualifications, wealth, health, relationship with the legal system, etc.).

The economic causes of migration are two-way, just like the legal causes; positive, involving attraction to places which greater relative compensation, and negative, involving leaving the places which offer poor material rewards. Any displacement involves costs and affects the economy of the points of arrival and of departure. And that is why temporary displacements over long distances have only become possible when transport and communications technology brought the cost down by an extraordinary amount.

Although they are as important as the economic and legal aspects, the human factors in displacement are more difficult to perceive and to quantify. On the plus side, we have to consider public and political safety, the search for freedom, the opportunities for

¹⁰¹ The majority will have been born in the United States of immigrant parents, and will be United States citizens.

education for the successor generation, and equilibrium in sexual relationships. On the negative side, the cost of uprooting, the loss of population in the source society, and the potential costs of integration in the host society. Migrants are agents of globalisation in their source countries, and activate economic integration: remittances of money, tourism, air transport, telecommunications, and the nostalgia trade. By these means they contribute to the development of the source and host countries (Orozco 2004).

Migration is understood to mean any displacement of population, both outwards (emigration) and inwards (immigration), without specifying the distance or the official status of the displacement.

Flows are movements of population. *Migratory balances*, the difference between entries and exits in any territory over a determined period, generally one year (Table 6.1). The contiguous areas through which there occurs a high level of migrant traffic are called *migratory corridors*. The greatest migratory corridor in the world at present is that of Mexico-United States, followed by Russia-Ukraine, Ukraine-Russia, and Bangladesh-India. The *accumulation of balances* produces the *stock*. This term is employed in the sense of presence, not absence, because the countries or regions which receive immigration refer to it as the “stock of immigrants” in their territory, and the emigrant countries or regions, which lose population, refer to it as their “stock of emigrants” abroad or in the reference region (Table 6.2). The United Nations estimated that the worldwide stock in 2010 was 214 million migrants, of whom 128 million live in developed regions, and 86 million in undeveloped regions (Giovannelli 2009).

TABLE 6.1: Net migration rate plus adjustment
(per 1,000 persons)

	2002	2003	2004	2005	2006	2007	2008	2009
EU-27	3.8	4.1	3.8	3.3	3.3	4.2	–	1.8
Spain	15.7	14.8	14.2	14.7	13.7	15.5	9.0	1.7

Source: Prepared by M.A. Durán using data from the United Nations (2009).

TABLE 6.2: The international *stock* of migrants, by principal area

	International <i>stock</i> of migrants				Net migration	
	2010			2005-2010	2005-2010	
	Total (in thousands)	Percentage of total population	Percentage of women among migrants	Annual average ratio of change (percentage)	Net annual average of migrations (thousands)	Annual average ratio of migrations (per 1,000 inhabitants)
World	213,944	3.1	49.0	1.8		
Developed regions	127,711	10.3	51.5	1.7	2,700.5	2.2
Developing regions	86,232	1.5	45.3	2.0	-2,700.5	-0.5
Developing countries	11,531	1.3	47.4	1.1	-314.6	-0.4
Sub-Saharan Africa	18,007	2.1	47.2	1.7	-360.5	-0.4

Source: United Nations. International Migrations. Department of Economic and Social Affairs. Population Division, 2009.

In absolute terms, the greatest stock of immigrants is found in the United States (38.4 million immigrants), the Russian Federation (12.1 million), and Germany (10.1 million). The stock of immigrants is also high in some low per capita income countries such as India (5.7 million) and Pakistan (3.3 million). According to estimates by the United Nations, migrants who leave less developed countries are just as likely to go to other undeveloped countries as they are to go to developed countries. On the other hand, migrants who leave developed countries have a 3.5 times higher probability of going to a developed country than to an undeveloped country (PRB 2008)¹⁰².

In relative terms, which measure the proportion of immigrants out of the total population, the ranking is very different. In the majority of OECD countries, the stock of immigrants does not reach

¹⁰² It is estimated that the less developed countries lost 123 million migrants in the year 2005, of whom 62 million live in more developed countries and 61 in less developed countries. On the other hand, 53 million people left the more developed countries and live in equally developed countries, and only 14 million live in less developed countries.

10% of the total population, while in some small countries with a high per capita income with barriers to granting citizenship or which have received a high percentage of their population for political reasons, the immigrant population is similar to or even higher than the original native population. Qatar has the world's highest percentage (78%), followed by the United Arab Emirates (71%), Kuwait (62%), Singapore (43%), Israel (40%), and Jordan (39%) (World Bank 2008). Table 6.3 shows the growing percentage of foreigners among workers in various different developed countries between 2000 and 2006.

Flow, balance and stock are terms which are employed frequently in the analysis of migratory processes, and compose powerful images similar to those of the traffic in goods. However, it is not

TABLE 6.3: Foreign workers 2000-2006
(percentage)

	Foreign workers over total workers	
	2000	2006
United States	12.9	15.6
Australia	24.7	24.9
Austria	10.5	11.9
Belgium	8.6	9.2
Denmark	3.4	4.2
France	6.0	–
Germany	8.8	8.5
Italy	3.9	5.9
Japan	0.2	0.3
Luxembourg	57.3	65.0
Netherlands	3.9	3.3
Spain	2.5	8.5
Sweden	5.0	4.3
Switzerland	20.1	21.0
United Kingdom	4.0	6.3

Source: OECD (2008, 211).

usual to refer to the depopulated segments, the holes left behind by the emigrant population in their source societies.

Migrations are more probable in regions with demographic growth, although this is neither a necessary condition nor a sufficient condition. The world demographic structure is heterogeneous by nature, but so is the structure of the continents. In the case of Latin America and the Caribbean, natural population growth has been intense at other times (15.7% per year in 2005), but today it has slowed slightly. The international stock of emigrants is 1.2% of the resident population, and similarly, although in absolute terms it has increased by more than half a million people over the decade, it fell slightly in proportion to the population living in the area. The number of refugees has fallen. With regard to money transfers, they have tripled in absolute terms, and have doubled in proportion to GDP, reaching 1.9% of GDP in 2005.

In North America (not including Mexico, which is included in Latin America and the Caribbean) the natural population growth (0.54%) is proportionately one third of what it is in Latin America, although real growth almost doubled (0.97%) as a result of immigration. The stock of international immigrants is 13.5% of the resident population, a ratio more than ten times higher than that of Latin America. As a receiving region, the money transfers received are not very important.

In Oceania, with a natural growth of 0.99%, real growth is one third higher because of immigration, with a stock which is 15.2% of the resident population. As a region which is principally a receiver of immigrants, the money transfers are not very significant for their GDP.

In Africa, the natural annual increment in population in 2005 was 2.23%, and the real rate is slightly lower because of immigration. Its stock of international migrants was 1.9% in 2005, having fallen in comparison with the previous decade. Refugees form a very high proportion of migrants (35% in 1995, 17% in 2005). Money transfers constitute 2.4% of GDP and in some countries they reach very high levels. Sub-Saharan Africa has almost doubled the demographic growth indicator (2.5%) of North Africa (1.9%).

There has been a high growth in population in Asia over the decade, slightly reduced by migrations. The volume of migrants and

of transfers is very high in absolute terms, although not so much in relative terms. The migratory stock makes internal movements and those in the opposite direction invisible. The stock is 1.4% of the population, and transfers are 0.9% of GDP. Demographic growth is twice as much in South Asia (1.7% annual average from 1997 to 2006) as it is in East Asia and the Pacific (0.9%). The situation is not much different from the Middle East and North Africa (1.9%), or Latin America (1.4%), while Central Asia lags an enormous distance behind (0.2%).

Finally, in Europe natural population growth is negative, and its migrant stock is the highest in the world. Net migration was 1.5% of the population both in 1995 and in 2005, and for every one hundred births in the region, 14.7 new migrants came in. Transfers constitute 0.5% of GDP, and increased marginally over the decade.

The stock of migrants is very varied, and shows the political and economic situation of each country in addition to other cultural and environmental elements. Among those which achieved the highest levels of migrants, the most significant are Kazakhstan (25% of its population), Eritrea (19%), El Salvador (16%), Ukraine (13%), Cuba (11%), Mexico (11%), Mali (9%), and Morocco (8.6%). Some of these countries also have the highest levels of immigrants, such as Kazakhstan (16.9%) and the Ukraine (14.7%). Other countries with a high stock of immigrants are Oman (24.5%), the Lebanon (18.4%), the Ivory Coast (13.1%), Belarus (12.2%), and Costa Rica (10.2%).

6.1.3. Desires and expectations in emigration. The Gallup Report 2009

It is difficult to mention human displacements with the same indifference as if it was a reference to coal or petroleum, and the terms chosen easily reveal value criteria. For example, "loss" is generally associated with undesired events, but in fact it could be replaced by positive implicit value terms if it were to be considered a gain, a relief, or the success of a free voluntary project in search of better opportunities.

The expectations of the UN for the period 2010-2050 are for a net positive migration of close to 2.5 million people per year in the developed regions, equivalent to an approximate cumulative contri-

TABLE 6.4: Expectations for inter-regional migrations 2010-2015, according to the United Nations

	More developed regions		Less developed regions	
	Net migration per year, men and women, in thousands	Net migration rate, ‰	Net migration per year, men and women, in thousands	Net migration rate, ‰
2010-2015	2,555	2.1	-2,555	-0.4
2015-2020	2,426	1.9	-2,426	-0.4
2020-2025	2,356	1.9	-2,356	-0.4
2025-2030	2,368	1.9	-2,368	-0.3
2030-2035	2,368	1.8	-2,369	-0.3
2035-2040	2,379	1.9	-2,379	-0.3
2040-2045	2,378	1.9	-2,378	-0.3
2045-2050	2,378	1.9	-2,378	-0.3

Source: United Nations (2009).

bution of 2% of the total population (Table 6.4). In the less developed regions, the same number of the population will be lost, which will represent a cumulative annual loss of 0.4% of the total population. Although the number of people is the same, it will have a proportionately greater effect on the developed regions because there is a smaller population living there than in the undeveloped regions. In the next forty years, the population arriving in the developed world from the undeveloped world will be almost the same as the population currently living in those areas.

According to the World Bank (2008), for the period 2010-2015 net migration in the most developed regions will be greater than 2.5 million people every year, the same number as the least developed regions will lose.

As an example of the heterogeneity between culturally and territorially close countries, we can cite Egypt and Morocco. The proportion of women of reproductive age in these two countries in North Africa is similar (about 25%), but Morocco is growing demographically at a rate which is half that of Egypt. Morocco has a very high stock of emigrants, a proportion of 8.6% of its population, proportionately almost four times higher than that of Egypt. Of every hundred uni-

versity graduates, in Egypt four emigrate, and in Morocco ten, and emigration is most accentuated among nursing personnel; in Morocco, almost fifteen out of every hundred graduates in this specialisation emigrate. The proportion of immigrants is identical in the two countries. Money transfers are similar in volume, which entails a greater impact in Morocco, because its population is barely more than one third of that of Egypt, but the economic influence is attenuated because the per capita GDP is higher in Morocco than in Egypt. In the two countries, remittances sent are almost irrelevant in comparison with those received, with the proportion not reaching one per hundred in Morocco and three per hundred in Egypt.

The Global Forum on Migration and Development 2009, sponsored by the United Nations, contributed to making the implications of development, migration, and the flow of transfers more visible. The Forum was organised around three core themes:

- a) *The analysis of policies which can contribute to making migration a factor of development*, both for the source countries and for the host countries, exploring opportunities, limits and weaknesses. The need to generate sensitive policies in respect of gender issues was highlighted and human mobility was presented as a part of the solution for the recovery of the world economy and not as the problem.
- b) *The integration of migrants over the short and long terms*, a process which requires effort both on the part of the immigrants and on that of the societies in which they settle, and which also cannot pass over the question of reintegration after their return to their countries of origin or the different time spans of migration (short duration, circular, long duration).
- c) *Institutional consistency and coordinated action between the agents involved (partnerships)*. In this theme the importance of collecting data and research for decision making about migration and development was highlighted (Global Forum on Migration and Development 2009, 1-14), as were possible measures for strengthening the connection between migrants and civil society (development of web pages, institutionalisation of commemorative days, presence in the communications media, etc.).

According to the report presented to the Forum by the Director of Gallup (Espova 2009)¹⁰³, based on a survey carried out in 135 countries, 16% of the adult population wishes to emigrate permanently to other countries in search of a better future. Eight of out ten of those interviewed who gave this answer were living in developing countries, and the immense majority wished to move to developed countries. In the majority of the countries, the desire to relocate did not see any significant reduction during the global economic crisis of 2008. The United States is the destination country indicated by the majority of migrants, and it is estimated that 165 million people have expressed their desire to go and live there. Great Britain, France, Saudi Arabia, and Spain were the next most common countries chosen as a destination, a long way behind the United States. Spain is the potential destination for some 35 million future migrants.

If the desires expressed in the survey were to become reality, countries like Sierra Leone, Haiti, and El Salvador would lose approximately one half of their population. Others, such as Singapore, would triple. Saudi Arabia, New Zealand and Canada would increase by 180%, 175%, and 170 %, respectively.

The desires of the migrants often come up against barriers such as a visa or entry permit requirement, which obliges them to move to countries which are not their first preference. For example, 95% of actual migrants from Central Asia migrate to countries in the former Soviet Union, but only 49% indicated that as their first option in the survey.

6.2. The restructuring of remunerated and non-remunerated work as a consequence of migration

6.2.1. Depopulated segments and the change in age and gender ratios in the source areas

The information available for international comparative analysis of migrations is abundant and growing, but not sufficiently disaggregated so as to understand with precision the occupations of the

¹⁰³ The news item was distributed by Reuters and reproduced in many communications media throughout the world.

migrants in their source areas and their employment history after the first move. The detailed reports have a national or local scope, and therefore they have to be used with caution when they are taken as the basis of estimates of an international or worldwide scope.

If the estimate of the impact of migration on employment is not easy, estimating its impact on non-remunerated work is even more difficult. There are no international data obtained by direct observation and estimates have to be merely indicative, obtained through indirect indicators such as age, gender, the job status of the migrant, the demographic structures and the labour market in their places of origin and destination.

In spite of the difficulties, the analysis of the impact of migration on non-remunerated work is important on the conceptual, social, and political levels. It is important conceptually because in the majority, migrants are young or mature young, healthy, and strong at the moment of the move, with a capacity for struggle and integration into a different society. Their absence changes the proportions between adults and the elderly in their place of origin, and also that between the healthy and the sick. Frequently young children do not accompany them in their migration, at least during the first stages, and they remain to be cared for by other members of their family of origin. Emigration is an escape valve for situations of conflict and the lack of jobs or social opportunities. In some countries there is a high proportion of qualified emigration, and the majority of trained professionals in some specialist areas emigrate at the end of their training period. For example, in the small countries of Granada, Dominica, Santa Lucia, Cape Verde, Fiji, Sao Tomé and Príncipe, or Liberia, emigration rates for health personnel are extremely high, and more emigrate than remain in the country. This failure to return, or brain drain, is another aspect of displacement for educational purposes, which ends up turning into employment migration. For example, the emigration of qualified workers is high in the Arab region (League of Arab States 2009). If those who emigrate are women, the absence of their contribution to the economy and welfare of their households of origin in non-remunerated work is even greater than that of the men. Currently, migration throughout the world has reached the same level between the two genders, but there continue to be differences in some countries: in North Africa

male emigration is higher. It was also the same in Asia, but nowadays more women than men emigrate in the Philippines, Indonesia, and Sri Lanka (ESCAP 2009).

In the source countries, emigration has repercussions on the labour market by emptying certain occupations of workers, or in other cases, reducing the pressure produced by the lack of jobs. The reduction in the size of the households causes a parallel reduction in the amount of non-remunerated work required to cover domestic necessities, but redistributes the load of care for dependents between the members of the family who remain in the household. The social value of family members who are outside the market and are capable of assuming a greater load of non-remunerated work increases, a point which is very evident in the case of grandmothers, aunts, sisters, and other relations, for the most part women, when they take on the care of the children of the emigrants. In some households, the situation becomes dramatic for those who do not emigrate and depend on care by others because Social Security cover does not exist, and they lack their own monetary resources. This type of situation is not common at the initial moment of migration (specifically because it is hard, and this dissuades immediate family members from moving) but not so uncommon in respect of situations which arise later, after the migration has already occurred. In fact, taking responsibility for family members who become dependent is one of the most frequent causes for the sudden or planned return of migrant women (Robila 2009; UNIFEM 2009).

Migration frequently entails a change in the relationships between the genders, which is very evident when the person who emigrates does so without the company of their family, but it is also important when families get together again. Men who emigrate alone are obliged to take on non-remunerated work (cleaning, shopping, cooking, etc.) which is habitually performed by the women in their household of origin. And in parallel, the women who remain behind in their places of origin have to take on tasks (official business, participating, and maintenance) which were formerly performed totally or partially by the men. Women who emigrate, even when their employment in their place of destination is an extension of their traditional household activities but for an employer, have to go through the experience of becoming independ-

ent and adapting to new circumstances. The separation of spouses and the separation between generations give rise to “transnational families” (Salazar Parreñas 2005). From the perspective of care, a new form of “remote motherhood” has arisen, which extends like a network to include not only “transnational mothers” but also “transnational grandmothers” and “transnational daughters or sisters”. Some authors speak openly about the “care drain” (Solé, Parella and Cavalcanti 2007) or of the establishment of “worldwide chains of affection and care” (Hochschild 2001).

Families cannot remain unchanged when displacement and economic changes occur. Money remittances modify the power relationships between the members of the family, both with respect to those who emigrate and with respect to those who remain. They not only contribute to empowering those who make the transfers, but also those who administer the resources which come from outside in their place of origin. The redefinition of roles is not free of conflict, and is frequently accompanied by intra-family tensions which lead to separations or divorces and the commencement of new relationships, both at the destination and at the point of origin.

Families with migrants spend more money on education, and it is more probable that the children will not be truant from school and finish their careers, particularly the girls. General consumption and consumption on health also increase. Cheap mobile telephones and Skype have mitigated the costs of separation. Field studies carried out in Ecuador, Ghana, India, Madagascar, and Moldavia show that in the rural regions with male emigration, the role of the women in decision making in the community increases. This is, however, something which does not always occur, or may occur only temporarily, as is similarly shown by field work carried out in Albania and Burkina Faso (PNUD IV, 84-85).

6.2.2. The restructuring of employment and non-remunerated work in the places of arrival

In the societies where the immigrants arrive, the relationship between remunerated and non-remunerated work is also changed. A large proportion of immigrant workers find work in sectors which offer services similar to those which are offered in households, such as food, cleaning, or the care of the sick and of children. Their work

contributes to maintaining and expanding those sectors. Some immigrants, a not insignificant proportion, find employment directly in households, adding services to those which are already produced in the household, or substituting one of its members, especially women, in the non-remunerated domestic work.

In the destination countries, the replacement of non-remunerated work by remunerated work causes effects on family savings (micro level), and the formation of capital (macro level), which are not sufficiently understood. On the micro level, services aimed at freeing up the qualified work-force for the labour market is materialised in an increase in consumption and the opportunity to generate family savings, which in turn facilitates an increase in investment. But this is not the only effect, in some households, the remunerated workers do not free up work for the market, but only improve their quality of life or alleviate previously difficult situations, which case, they cause the consumption of other goods to reduce, and they can exhaust any savings and capital which had been previously accumulated by the household and by the network of households linked together through the solidarity of relationships. In immigrant households, non-remunerated work on many occasions makes it possible to subsist on very few resources, which would be insufficient if the goods and services had to be acquired at market prices. The accumulation of people living in the same dwelling is not only a way to bring down the high costs of accommodation, but also to facilitate the provision of non-remunerated services within the home, both for adults and for dependent children. The substitution of goods and services from the market by goods and services produced right in the household permits savings, investment in education for the successor generation, and transfers to other households.

6.3. An illustration: migration and remittances in Spain

6.3.1. The source of migrants and their geographical location in the country

Spain has been a country of major internal migration and migration abroad. The balance of international displacements only began

to change at the end of the 20th century, and the term migrant overlapped until it almost merged with the word immigrant in everyday talk. Emigrants were never as visible as immigrants, because the footprint of immigration is presence, and that of emigration is merely absence. As an official expression of the changes over the first decade of the 21st century, the Ministry of Labour changed its name to the Ministry of Labour and Immigration in 2008.

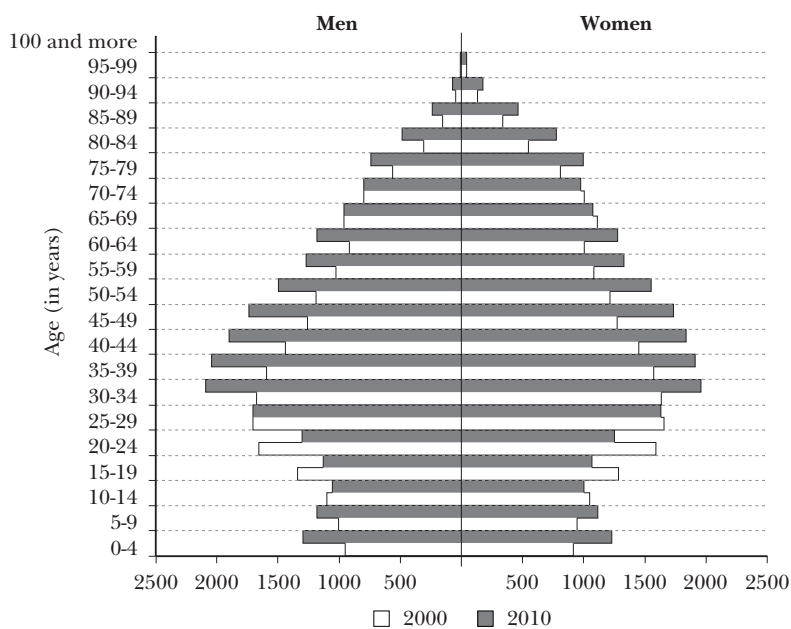
Three stages can be distinguished in recent migratory flows in Spain (Martínez Torres 2008,14):

- a) Up until the seventies, internal flows were from the poorest regions of Spain to the richest;
- b) During the eighties and the beginning of the nineties, net flows were very small, and return emigration was occurring. The differences in the unemployment rate were not the principal cause of migration, and the educational level of the migrants was higher than the average.
- c) The third stage began in 1996, with the massive arrival of foreign immigrants. The richest Spanish regions diminished in population, while the poorest and those with the highest unemployment ratio became net receivers;

The expansion of the welfare state and unemployment cover have made a decisive contribution to reducing internal migration. Workers in employment have a greater probability of emigrating than those who are registered unemployed, but less than those not registered. Some factors, such as the price of accommodation, shape the standard of living and reduce interest in cities and the more developed areas. What has barely been studied up to now is the impact of some conditions which are not immediately economic on how decisions are made about migration, such as the responsibility for taking care of dependent elderly people.

The demographic impact of immigration is represented graphically in population pyramids (Graph 6.1). With the estimates of World Population Prospect on the distribution by age and by gender of the population in 2000 and 2010, the change in the profile of the pyramid can be seen, with the rejuvenation of the base and central ages. On the assumption that mortality were to be nil in the age

GRAPH 6.1: Population pyramid of Spain 2000-2010, distribution by gender and age group



Note: The total figure for the population in 2010 according to the United Nations is 22,748 men and 23,329 women. In the year 2000 there were 19,722 men and 20,566 women. According to the Instituto Nacional de Estadística (INE) these figures were 23,226 men and 23,795 women in 2010, and 19,821 men and 20,678 women in the year 2000. For the year 2000, the estimate of the INE is 0.5% higher than that of the United Nations, in the case of both the men and the women. For the year 2010, the estimate of the INE is 2.0% higher than that of the United Nations, in the case of both the men and the women.

Source: United Nations, Department of Economic and Social Affairs, Population Division (2011). *World Population Prospects: The 2010 Revision*, CD-ROM Edition.

ranges between 15 and 30 years old, the population which occupied a particular step in the pyramid the year 2000 remains intact ten years later, two steps higher. If an increase is shown, it will be due to immigration. In the case of Spain, instead of the step corresponding to men of between 25 and 29 years old remaining intact, there are 23% more people than there should be; these are the immigrants. In the following age group there are 22% more, and in the range from 35 to 39 years old, the extra percentage is 17%. The same situation applies for women, for whom growth is, respectively, 23%, 21% and 14% (Table 6.5). The demographic life belt which widens the

TABLE 6.5: Distribution by age and by gender of the population of Spain, 2000-2010

(in thousands of persons)

Women		Age	Men	
2000	2010		2010	2000
2	6	100 years and more	2	1
26	51	95-99	15	9
125	186	90-94	72	49
322	459	85-89	239	151
539	756	80-84	485	307
805	981	75-79	734	569
995	968	70-74	801	800
1,105	1,066	65-69	957	967
1,004	1,226	60-64	1,149	919
1,075	1,309	55-59	1,263	1,030
1,217	1,505	50-54	1,483	1,188
1,271	1,692	45-49	1,704	1,261
1,443	1,809	40-44	1,870	1,437
1,580	1,891	35-39	2,014	1,591
1,632	1,908	30-34	2,014	1,671
1,655	1,571	25-29	1,650	1,721
1,579	1,219	20-24	1,290	1,650
1,276	1,069	15-19	1,132	1,342
1,047	998	10-14	1,053	1,101
944	1,095	5-9	1,161	999
904	1,194	0-4	1,271	957

Source: Prepared by M.A. Durán using data from the United Nations (2009).

young central age group of the Spanish demographic pyramid is that which corresponds to the gap which is missing in the countries from which the immigrants hail.

According to the survey on immigration, there was a fall in the number of migrants coming from abroad between 2006 and 2008, going from 253,300 to 214,400. This survey, which was carried out on an LFS (INE Working Population Survey) sub-sample, defined “*migrant*” as “a person who has changed their place of residence with

respect to the previous year both within the country and abroad”, and this latter category was identified as *exterior migration* (Table 6.6). Overall, the migrants are young people, but children and the elderly also move. In 2008, of the 593,000 migrants indicated, 214,400 (36%) came from abroad. Of those, 84% held a foreign nationality (180,400), 14% held Spanish nationality (29,700), and the remainder held Spanish and foreign double nationality (2%). Staying with the same source, after the marked increase in 2006 and the fall in 2007, the effect of the economic crisis was not reflected in a reduction in the number of migrants coming from abroad in the year 2008. It even increased slightly, with 2,000 people more than in the previous year. The proportion of children among the immigrants

TABLE 6.6: **Migrants proceeding from abroad and of foreign nationality, 2006-2010**

(in thousands and in percentages)

	2006		2007		2008		2009		2010	
	N	%	N	%	N	%	N	%	N	%
Distribution by gender										
Total	206.8	100.0	178.5	100.0	180.4	100.0	122.1	100.0	69.7	100.0
Men	85.6	41.4	66.1	37.0	74.8	41.5	48.7	39.9	26.8	38.5
Women	121.2	58.6	112.4	63.0	105.6	58.5	73.4	60.1	42.9	61.5
Distribution by age groups										
0-15 years	29.4	14.2	28.8	16.1	41.4	22.9	20.8	17.0	13.3	19.1
16-19 years	13.3	6.4	20.6	11.5	19.9	11.0	12.1	9.9	12.9	18.5
20-29 years	66.0	31.9	60.1	33.7	48.8	27.1	30.7	25.1	13.6	19.5
30-39 years	62.7	30.3	44.1	24.7	38.3	21.2	27.9	22.9	17.3	24.8
40-49 years	15.7	7.6	10.9	6.1	20.1	11.1	16.3	13.3	6.1	8.8
50-64 years	10.0	4.8	7.3	4.1	7.2	4.0	6.2	5.2	5.2	7.5
65 and more years	9.7	4.7	6.7	3.8	4.7	2.6	8.1	6.6	1.4	2.0

Source: Prepared by M.A. Durán using data from the Migration Survey, 2006-2010 Series. (INE 2011).

almost doubled over three years, and in 2008 they made up 22.9% of arrivals.

The proportion of women that year in international migration was 58%, and in internal migration 48%. Among international migrants the proportion of those over the age of 65 years old is low (2.5%), with the same proportion being found among men and women¹⁰⁴. In internal migration the proportion rose to 6.6% and the proportion of women to men was almost three times as great (8.3% *vs.* 3.0%). Women of advanced age move from their area more often than men because they do not have a partner to keep them back and look after them, they are less involved and sustained by economic and social relations, they seek to be close to the family members who have migrated before them, and in many cases their contribution in non-remunerated work is welcomed as an important resource for households with children which had migrated earlier.

A similar term to *immigrant*, although not identical, is that of *foreign resident*. In everyday language, the term immigrant is employed to refer to those who arrive in search of employment or refuge. On the other hand, the concept of resident does not have a clear image: sometimes the term is used to refer to people with healthy resources who live in the country without looking for employment (even if they may have an occupation or their own businesses), and on other occasions it is used to distinguish immigrants with a residence permit from immigrants who do not.

According to the Permanent Immigration Observatory, in 2009 there were 4,625,191 foreigners in Spain with a registry certificate or residence permit in force; of those, 53.6% were men and 46.14% were women¹⁰⁵ (Table 6.7). The number had increased 11% in com-

¹⁰⁴ The total number of migrants is estimated by this source as 593,000, of whom 378,500 are internal. Of the international migrants, 123,700 were women and 90,800 men. The figures refer to where they came from, not to their nationality.

¹⁰⁵ Permanent Immigration Observatory (Observatorio Permanente de la Inmigración), Ministry of Labour and Immigration, 30 June 2009. This figure does not include the following situations: foreigners in Spain for a *short stay* (*estancia* – a maximum duration of stay of 3 months out of every 6, with the possibility of extension for a further period of the same length), trans-frontier workers, asylum seekers, refugees or stateless persons, and foreigners under the EU Community Regime who have not requested registration in the Central Register of Foreigners, or who have applied for this but have not yet received the appropriate certificate (p. 13). Nor does it include immigrants who should have applied for a permit but have not done so.

parison with the year before. By origin, they were distributed as follows:

TABLE 6.7: Origin of foreign residents in Spain, 2009
(percentage)

European Community	38.4
Latin America	31.0
Africa	21.0
Asia	6.3
Non-Community Europe	2.9
North America	0.4
Oceania	0.1

Source: Permanent Immigration Observatory, 2009.

To this we must add the foreigners with a valid study permit, in which women are slightly predominant (54%). In 2009, there were 46,000 students, an increase of 6.1% over the year before.

In January 2009, the official figure was 5,598,691 registered foreigners, 12.0% of the total population, with a slightly higher proportion of men (12.87%) than women (11.16%)¹⁰⁶.

Classified by their official situation, out of the total number of foreigners with residence card in 2008 21.6% were work permits for employment, 0.3% work permits for self-employment, 10.8% non-working residence permits (which do not grant the right to work), 20.4% permanent residence (which grants the right to residence and work under the same conditions as Spanish citizens), and the remaining 46.8% held a European Community certificate or residence card (the community regulations of the EU).

6.3.2. Causes, reasons, and political discourse on migration

The analysis of the motives of migrants reflects the subjective and individualistic view of migration. Motivation is not always conscious for the migrant, or articulated, and even when it is, the migrant does

¹⁰⁶ The IOE Collective estimates that there were 6,418,100 immigrants in 2009, who comprised 13.8% of the total population of Spain.

not always wish to make it explicit or to declare it to people asking questions about it. The analysis of the cases is more structural and independent of the specific migrants who go through the displacement. In this type of analysis macro-economic and macro-sociological perspectives predominate over psychological perspectives. With regard to discourse about emigration, it is a predominantly political and literary approach; documents, declarations, laws or group discussions are employed as the instrument of observation instead of surveys. In respect of the motives of immigrants, a principal source of information is the National Immigrant Survey, carried out in 2007, and sometime confused with the Migration Survey. It defines *immigrants* as those over the age of sixteen years of age and born abroad who live in family accommodation in Spain at the moment the survey was performed. The definition includes people who are immigrants purely for reasons of residence, such as retired people, companions, etc. According to this source, the number of immigrants resident in 2007 was 4,526,522 people, of whom 24% had been resident in Spain for less than three years. Because of the date on which the survey was carried out, the data on occupational mobility may only be applied to immigrants who had arrived in the year 2004 or before, and who had already been through the minimum period to belong to the group under study.

The reason most frequently adduced by immigrants for the displacement was quality of life, and they indicate very varied aspects of this. According to the cited survey, the search for a better job (39% of those interviewed mention this), or the lack of a job in the place of origin (23%), are the most frequently mentioned reasons. Bringing the family back together is also an important reason, in particular for women, among whom it is the reason most often adduced (39% of women mention this and 25% of men). Education is a reason cited not only by immigrants of school age, but also by intermediate age groups, who consider it important for the successor generation. Retirement is a reason given principally by elderly immigrants. The climate is also mentioned by people of more advanced age than those giving employment reasons, although it is not exclusive to this group. Religious and political reasons are adduced very rarely.

The relatively low cost of living is an economic reason in which immigrants of various different ages coincide. The more elderly,

because it allows them greater purchasing power with their pensions; and the younger because it allows them greater savings. Bringing the family together is the principal reason put forward by those of less than 25 years old (Table 6.8).

TABLE 6.8: Reasons for immigrants' move to Spain, by gender*
(percentage)

	Total	%	Men	%	Women	%
Total immigrants	4,526,522	100.00	2,363,172	100.00	2,163,350	100.00
Retirement	164,959	3.64	87,953	3.72	77,006	3.56
Change of job location	268,794	5.94	161,393	6.83	107,401	4.96
Lack of employment	1,054,197	23.29	612,116	25.90	442,082	20.44
Searching for better employment	1,765,002	38.99	1,068,518	45.22	696,484	32.19
Political reasons	137,316	3.03	77,205	3.27	60,111	2.78
Religious reasons	17,737	0.39	10,776	0.46	6,961	0.32
Training or education reasons	379,170	8.38	188,738	7.99	190,433	8.80
Quality of life	1,810,838	40.01	974,554	41.24	836,285	38.66
Family reasons (bringing family together)	1,451,950	32.08	604,919	25.60	847,031	39.15
Cost of living	649,456	14.35	344,318	14.57	305,138	14.10
Climate	515,125	11.38	267,325	11.31	247,800	11.45
Temporary stay in transit country	51,456	1.14	23,766	1.01	27,690	1.28
Other reasons	547,002	12.08	258,805	10.95	288,197	13.32

* Multiple responses.

Source: Prepared by M.A. Durán using data from the National Immigrant Survey (INE 2007).

According to the special LFS module on immigrants (2008)¹⁰⁷, 62% had been resident in Spain for more than five years. The majority came in order to work without having agreed a job in advance (44%); only 9.5% had already organised their employment. More than 40% of women had come in order to bring their family to-

¹⁰⁷ This refers to persons from 16 to 74 years old.

gether or to be married (32% and 7%, respectively), which is double the proportion of men who came for these reasons. One out of every four immigrants had to improve their knowledge of the language in order to find an appropriate job.

Faced with the relatively fragmented information which is obtained using these data, some research projects opt for qualitative methodologies, in particular by means of discourse analysis. The Permanent Immigration Observatory has analysed the formation of the political discourse (laws, interpretations, initiatives, internal documents, declarations) on immigration in the European Union and in Spain (Zapata Barrero 2008). In the case of Spain, the formation of the political discourse shows a turning point with the terrorist attack of 11 March 2004. A very different approach is that of the Colectivo IOE (a Madrid-based research team) who, on the basis of discussion groups with immigrants, summarise their own discourse about their move and their access to the Spanish labour market in four types. At one extreme there is a defensive discourse of withdrawal, self-excluding, which assumes that migration is an abnormal and ultimately illegitimate phenomenon. At the other extreme, there is the discourse which ties migration to the inequalities inherent in the capitalist system, supporting active and subversive worldwide action for freedom. Between the two extremes of discourse are the two most frequently assumed responses by immigrants, on the one hand considering migrants as a dependent subordinate minority which has to be assimilated, and the approach which sees it as the result of economic globalisation and the adjustment of worldwide labour (Colectivo IOE 2010).

6.3.3. The evolution of public opinion: access to the labour market and to public services

With respect to migration, Spanish public opinion has gone on adjusting to the changes in their own circumstances. In 1996, a period of economic expansion in which the memory of Spain's own emigration was still recent, opinion about freedom of residence and work were very positive. In a survey by CIS in 1996, when asked in general terms whether "everyone should have the liberty to live and work in any country although it is not their own", as many as 95% of the replies were positive. If the question became more specific,

about the settlement of workers from the European Union in Spain, who in fact already legally enjoyed the right of free circulation, the positive response fell considerably, and settled at 66%, which was still a majority. 29% were of the opinion that the number of foreigners resident in Spain was excessive (CIS 1996).

One decade later, in 2005, the economic expansion continued, and the number of immigrants in Spain had increased considerably, and a large number of those were illegally resident. Public opinion lacked vocabulary to describe a situation which could be summarised in the divergence between foreigners with resident permits, and foreigners registered in the local census. In the year 2003, only 50% of those locally registered had residence permits, and a legal vacuum arose at the same time as the semantic one. Depending on circumstances and ideology, those lacking permits were considered to be *illegal* or simply *lacking documentation* (González Enríquez 2008, 90). The CIS surveys reflected this change in evaluation in public opinion, and 40% of those interviewed mentioned immigration as one of the principal problems of the country. The number of those who thought that there were “too many” immigrants had doubled and was now a majority (59.6%). 84.7% of those interviewed were of the opinion that only “those immigrants who had a work permit” should be allowed to enter, and 6% would prohibit immigration “completely”. Furthermore, 53.6% were of the opinion that all of those who remained unemployed for an extended time should leave Spain (CIS 2005).

According to the CIS Barometer survey of September 2009, 14% of those interviewed considered that immigration was the principal general problem in Spain, a relatively high proportion which was only exceeded by unemployment and problems of an economic nature. In the section on problems which affected those interviewed personally, immigration was rated in sixth place out of a list of twenty items (5.2%). It came in behind unemployment and the financial situation, public safety, housing, and pensions.

In 2007, in the Survey of Young People carried out by CIS, there were 67.6% who supported the idea that the number of immigrants was excessive, and the ideas that “they take jobs away from Spanish people” (51%) and “they make wages lower” (63.8%) had also become a majority view (CIS 2008b). A great majority was in favour of

limiting the entry of immigrants to those who came with an employment contract (70.9%), of making entry difficult (8.3%), or of prohibiting it altogether (2.4%), against the 14.5% who were in favour of allowing entry with few obstacles. With respect to the immigrants who were already in Spain but who had not made their position legal, opinions were distributed as shown in Table 6.9.

Attitudes on all issues referring to immigration are more critical among young people with “middle” and “low” levels of education because they compete more directly for all resources. For example, the idea that the number of immigrants is excessive is supported by 76.6% of young people with primary education and 70% of those with technical school training (Formación Profesional – FP), but only by 51% of those with higher university education. By gender, 65% of men and 70% of women favour this opinion.

In the Attitudes towards the Welfare State Survey of June 2008, immigrants are cited by 14.8% of those interviewed as receiving “a lot” of protection by the State, a very high number when it is compared with those who believe that the unemployed receive a lot of protection (1.1%), or families with elderly dependent persons in their care (0.2%), or the disabled (1.0%). Simultaneously immi-

TABLE 6.9: Attitudes of young people to the regularisation of immigrants *

Regularise their situation in all cases	15.2
Regularise their situation in the case of those living in Spain for several years	25.1
Regularise their situation only in the case of those who have work	42.4
Let them stay as they are	1.3
Attempt to return them to their country of origin	10.4
Depends on each specific case	3.2
DK	2.1
DA	0.4
Total	100.0

* The question posed was: “With respect to immigrants who are already in Spain but who have not regularised their situation, what do you think would be best?”

DK - Doesn't know; DA - Doesn't answer.

Source: Youth Survey (CIS 2008).

grants occupy the last place (1.0%) among groups cited as being those who should receive more protection from the State. By contrast, 32.7% call for more protection for elderly people who live alone. 14.1% and 13.0%, respectively, call for more protection for families with disabled or elderly dependent people in their care.

Spanish public opinion is very demanding of services from the State, and simultaneously very critical about their efficiency in public administration. With respect to the Cost/Benefit ratio between taxes paid and the public services received, the general opinion is unfavourable, 54.6% of the population say that they get little benefit from what they pay in taxes and contributions, and that they receive less than what it costs them (61.1%) (CIS 2008a). This is reflected in research paper no. 2765 of 2008 by the Centre for Sociological Research (IEF 2009). Public opinion consulted by means of the Tax Barometer of the Institute of Fiscal Studies follows the same line (IEF 2009). It shows a negative opinion, in this case about the contribution of immigrants to the common needs through the payment of taxes. With respect to taxes, 33% of those interviewed consider that immigrants pay less tax than the rest and 19% consider that they do not pay any tax at all. With respect to the use of public services and benefits, the most frequent opinion is that they use them in the same proportion as Spanish people (46%), but this is almost equalled by the 45% who considered that they use them more, and only 4% believe that they use them less.

Opinion as to whether immigrants should have the same access as Spanish people to public services and benefits is very different depending on whether the question refers to legally authorised immigrants or illegal immigrants. In the first group, the majority hold the opinion that they should have similar access, although 27% would prefer to limit their access. The situation is reversed for illegal immigrants, in which case the majority opinion is that access to public services and social benefits should be totally or partially restricted.

Public opinion is divided between the appropriacy of opening up or closing migration. The situation in which the members of a group of the users of a service (such as the passengers on a bus) have to decide whether to provide or block access to new users is called the *bus driver's dilemma*. When a certain point is reached, those waiting outside fight to get in, while those who are already in the bus

fight to keep the doors shut so as not to impair the conditions of the service. The driver has to decide whether to stop or drive on past when he gets to a bus stop.

The bus driver's dilemma is constantly being posed in the labour market, where the interests of workers with a formal, regular and well-paid employment align with restricting entry, while the interests of workers who are outside will be in favour of openness and de-regulation.

The *regulation of the labour market* is one manner of defining who shall have the right to enter the bus, and leave the others outside. All of the activities which the employment market does not reward sufficiently will be pushed beyond the scope of regulation, although some workers whose real remuneration is complemented or subsidised by other agents distinct from the employer, for example by means of preferential access to public goods (Social Security, health, education, housing, etc.) are also able to gain access to formal regularised employment.

The bus driver's dilemma constantly affects workers who provide remunerated care, both in relation to other workers of the same country and in relation to workers from other countries. For workers already established in the labour market under conditions of formalisation and recognised rights, workers from outside this nucleus represent a threat and they are only in favour of letting the outsiders join the market if they receive guarantees that the entry of new workers will not cause their existing working conditions to deteriorate. At times or in places of economic expansion, the entry of new workers does not generate any social conflict, but in times or sectors of recession they do.

With respect to workers from other countries or regions, those who are potentially capable of moving, the dilemma is posed with even more force than in respect of workers from the same country, because the tensions are not smoothed out by the mere fact of sharing territory, social networks, or family members, and general social rights or political rights.

6.3.4 Occupational mobility of immigrants

The National Immigrant Survey is orientated towards the living standards of immigrants and their family circumstances, and there-

fore it does not provide any employment information. Nevertheless, it offers some data which other sources do not mention. Table 6.10 shows how among immigrants who are in employment the level of formal education is higher among the women than among the men. Among those with employment in restaurant and personal services and salesmen, which are the most similar to work in households, women have a level of education slightly higher than men. Out of an eight point scale, the men score 4.93 points and the women 5.22 points.

As in all of southern Europe, entry of immigrants into union representative systems is low. They concentrate in labour intensive sectors with a low added value, such as small companies, family

TABLE 6.10: The level of education of immigrants in employment (total) and of immigrants occupied in restaurant and personal services and retail sales, by gender
(horizontal percentages)

	Level of education									
			A		B		C		D	
	Total	%	N	%	N	%	N	%	N	%
Total	2,269,092	100.0	17,873	0.79	4,271	0.19	36,616	1.61	304,742	13.43
Total men	1,345,351	100.0	14,197	1.06	3,421	0.25	27,279	2.03	187,099	13.91
Total women	923,741	100.0	3,676	0.40	850	0.09	9,338	1.01	117,643	12.74
Total immigrants in restaurant services, salesmen	438,165	100.0	6,233	1.42	0	0.00	8,045	1.84	56,742	12.95
Total men	168,068	100.0	3,939	2.34	0	0.00	3,532	2.10	23,437	13.94
Total women	270,097	100.0	2,294	0.85	0	0.00	4,513	1.67	33,305	12.33

A: Has some education but does not know what. B: No formal education, or has not followed course of primary education. C: Primary education not completed. D: Primary education. E: Secondary education, first cycle. F: Secondary education, second cycle. G: Tertiary education, first cycle. H: Tertiary education, second cycle. I: Has no education, or does not know whether has any studies.

Scale employed: A=1; B=2; C=3; D=4; E=5; F=6; G=7; H=8; I is excluded from the calculation.

Source: Prepared by M.A. Durán using data from the National Immigrant Survey (INE 2007).

companies, and non-business employers (domestic service), where the unions also have little influence among non-immigrant workers (González Enríquez 2008, 91).

15% of immigrants older than 16 years of age with more than three years in Spain do not currently work and have not worked in Spain before (Table 6.11). The majority fall into the category of non-working immigrants, which is made up principally of European retired people. Another 19% have worked before but do not do so now, because they are retired or for some other reason. Among those who have been resident in Spain for more than three years and work, only 29% have the same job now as they did when they arrived, and therefore mobility can be estimated at 71% from this

TABLE 6.10 (contd.): The level of education of immigrants in employment (total) and of immigrants occupied in restaurant and personal services and retail sales, by gender
(horizontal percentages)

Level of education										
E		F		G		H		I		Weighted index of education
N	%	N	%	N	%	N	%	N	%	
373,346	16.45	867,083	38.21	462,153	20.37	49,348	2.17	153,659	6.77	5.07
241,561	17.96	499,782	37.15	236,500	17.58	29,084	2.16	106,428	7.91	4.91
131,786	14.27	367,301	39.76	225,653	24.43	20,264	2.19	47,231	5.11	5.31
78,697	17.96	189,330	43.21	67,196	15.34	4,393	1.00	27,529	6.28	5.09
31,814	18.93	68,266	40.62	22,477	13.37	933	0.56	13,670	8.13	4.93
46,882	17.36	121,064	44.82	44,719	16.56	3,460	1.28	13,859	5.13	5.22

A: Has some education but does not know what. B: No formal education, or has not followed course of primary education. C: Primary education not completed. D: Primary education. E: Secondary education, first cycle. F: Secondary education, second cycle. G: Tertiary education, first cycle. H: Tertiary education, second cycle. I: Has no education, or does not know whether has any studies.

Scale employed: A=1; B=2; C=3; D=4; E=5; F=6; G=7; H=8; I is excluded from the calculation.

Source: Prepared by M.A. Durán using data from the National Immigrant Survey (INE 2007).

TABLE 6.11: Employment situation and occupational mobility of foreign immigrants with more than three years of residence
(percentage)

	Total	Percentage	Percentage
Total	4,526,522	100.00	–
Less than three years' residence	1,076,666	23.79	–
Three or more years of residence	3,449,856	76.21	100.00
Currently has the same employment as their first job on arrival in Spain	658,384		19.08
Currently has a different employment from their first job in the same sector of activity	494,195		14.33
Currently has a different employment from their first job, in a different sector of activity	1,116,513		32.36
Is not currently working, but had work on arrival in Spain	661,151		19.16
Is not currently working, and did not have work on arrival in Spain	519,613		15.06

Source: Prepared by M.A. Durán using data from the National Immigrant Survey (INE 2007).

period, which is without any doubt a very high rate of changing jobs.

More than 80% of immigrants who started off with highly qualified occupations, such as company management or technical and professional work, have maintained the same occupation (Table 6.12). Artisan and qualified workers also have a high rate of continuity in their jobs (73%). In other occupations continuity is lower, although is higher than 50%. The only exception is that of qualified workers in agriculture and fisheries, where only 31% of those who started remain in their first job; the rest have changed to other occupations, such as technical and support staff (3%), restaurant and personal services and salesmen (11%), qualified workers in industry and construction (25%), and other non-qualified jobs (22%).

The data in the National Immigrant Survey refer to the situation in 2007, and do not include immigrants who do not work, whether voluntarily, because of sickness, or because they cannot find employment. After the economic crisis of 2008-2011, the employment situ-

TABLE 6.12: Occupational mobility of immigrants*
(percentage)

	A		B		C		D
	Initial occupation	Percentage	Current Situation	Percentage	Remains in same occupation	Percentage C over A	
Total	2,269,092	100.00	2,269,092	100.00	1,399,440		61.67
Armed forces	3,005	0.13	3,354	0.15	1,592		52.98
Managers in companies and the Public Administration	72,975	3.22	137,508	6.06	61,529		84.32
Scientific and intellectual technical and professional staff	160,678	7.08	183,110	8.07	130,579		81.27
Technical and professional support staff	129,342	5.70	150,272	6.62	80,454		62.20
Administrative type employees	98,376	4.34	120,013	5.29	54,796		55.70
Workers in restaurant services, etc	512,770	22.60	438,165	19.31	275,076		53.65
Qualified workers in agriculture and in fisheries	40,222	1.77	30,108	1.33	12,829		31.90
Qualified craftsmen and workers	345,728	15.24	432,985	19.08	255,318		73.85
Machine operators	83,791	3.69	158,995	7.01	49,183		58.70
Unskilled workers	820,122	36.14	613,839	27.05	477,790		58.26
Doesn't know	2,082	0.09	743	0.03	294		14.12

* Referring to immigrants with employment and more than three years of residence.
Source: Prepared by M.A. Durán using data from the National Immigrant Survey (INE 2007).

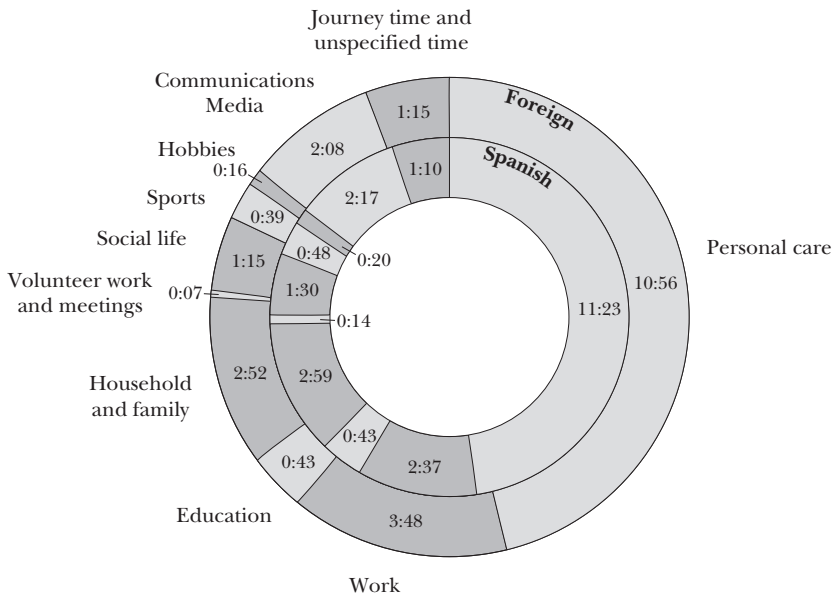
ation of immigrants has worsened because of the increase in unemployment and competition for work with Spanish workers, but this has not prevented the arrival of new immigrants, but only slowed it down.

The average profile of current occupations is one of low qualifications, just as it was for first jobs three or more years ago. Taken together, the current occupations of immigrants are better than those they held three years ago, which have been taken over by more recent immigrants. The most frequent occupation is that of unqualified worker (613,839), together with jobs in restaurant, personal and protection services, and shop assistants (438,165). 820,122 and 512,770 workers, respectively, came from these jobs, because they were the first that they had in Spain. In all categories of occupation, the most frequent situation is that their current occupation is the same as that they had when they came to Spain, even though they have changed jobs. Among those who came from restaurant services, 54% remain in the same classification, and 15% have change to the category of “not qualified”. Of those whose first job in Spain was classified in the category of “not qualified”, 58% remain in the same group, and 13% have moved to the wide ranging group of services mentioned above (Pajares 2009).

The Time Use Survey carried out by INE in 2002-2003 gives information about the differences in the daily lifestyle of immigrants¹⁰⁸ in comparison with the rest of the population. Immigrants are younger, and therefore there are hardly any retired people among them. There are hardly any housewives either, because immigrant women have entered the job market even though they have small children. Taken overall, immigrants devote 1 hour and 11 minutes per day more than Spanish people to remunerated work (Graph 6.2). In the non-remunerated work of caring for family and home, they invest 1 hour and 14 minutes less than Spanish people every day. In the distribution of the rest of their time in other activities, such as social life, communications media, sport, hobbies, education, meetings, voluntary work, and unspecified time, the differences are minimal compared with Spanish people.

¹⁰⁸ The term *immigrant* is used as a synonym of foreign resident.

GRAPH 6.2: Distribution of activities in one average day, by nationality
(in hours and minutes)



Source: Time Use Survey, 2002-2003 (INE 2004).

6.3.5. Family networks, non-remunerated work, and the flow of transfers to their places of origin

6.3.5.1. Potential and recorded remittances

Not all remittances of money between households have the same conceptual treatment. Various different sources provide information about transfers, but not all use the term in the same meaning. According to the Dictionary of RAE (2011) a *remittance* (“*remesa*”) is “the movement which is made of a thing from one place to another, and also the thing which is sent each time”. More colloquially, it is the “despatch of a set of things on one single occasion” (Espasa). This term is employed frequently to refer to the despatch of goods or money to family members who do not reside in the same accommodation and it is in this sense that it is used by the Family Budget Survey, while in the economics literature it is referred to as *international despatches*.

International despatches are attracting attention because of their economic and political importance, and the term transfer (“*remesa*”) is usually reserved for international transfers of money although this use of the term still coexists with the former meanings.

For the purposes of macro-economic analysis, and up until 2008, what was commonly understood to be meant by *transfer* (*remesa*) was distributed in accounting terms under three different headings:

- 1) Transfers by workers (current transfers of foreign residents);
- 2) Compensations of employees. These are funds sent by non-resident immigrants which includes all those who have been in the destination country for less than one year, frontier workers, etc. including their Social Security contributions. This heading is included within the Income item;
- 3) Transfers of capital by emigrants which are the goods or wealth which they take with them when they move. This heading is included under the Capital item.

The sixth edition of the Balance of Payments Manual (“Manual de la Balanza de Pagos”) is commonly known as MBP6; the instructions were published in 2008 and it is expected that they will come into force in 2014. In the new MBP6 the importance of transfers is recognised, and a complete appendix is devoted to the subject. “*Remittances*” are defined as “the income which resident households obtain from the rest of the world and which normally come from the temporary or permanent displacement of natural persons abroad” (García Cid 2009)¹⁰⁹. In the case of Spain it is estimated that remittances sent abroad amounted to 0.1% of GDP in 1998, and grew six-fold in a decade (0.6% of GDP in 2008).

With the entry into force of the new instructions, movements are classified as personal transfers, cash transfers, and transfers in kind. Other, wider, categories covered are the headings of *personal transfers*.

The Family Budget Survey in Spain employs the term *transfers* to refer to what households spent on remittances to members of the household not resident in the same accommodation. In the year

¹⁰⁹ Sections 4, 6, and 8. In 2007 it reached its highest point at 0.8% of GDP.

2007 this came close to € 450 million, a figure which is 29% higher than the preceding year. Nevertheless, in the year 2008, it contracted to € 387 million, a reduction of 14%, and in the year 2009 it contracted once again, falling to € 300.25 million. The Family Budget Survey does not take into account whether the remittance is domestic or international. In 2009, the expense under this heading only made up 0.06% of the total expense of households in Spain. Although the data on remittances from households where the head is foreign have not been published by the INE, remittances sent by households where the head of the family is of Spanish nationality have been published; they made up 94.0% of the remittances estimated by this source, and from this it can be concluded that remittances of money to other members of the household who are not resident to which the survey refers did not come from immigrant households.

In absolute terms (in thousands of millions of US Dollars), the countries which received most remittances in 2008 were India (52 thousand million), China (49 thousand million), Mexico (20 thousand million) and the Philippines (19 thousand million), and to a lesser extent Poland, Nigeria, Romania, Bangladesh, Egypt and Vietnam. The countries that depend most on the remittances in proportion to their gross domestic product (GDP) are a few small ones, in which the transfers exceed 20% of their GDP, and in some cases reach 50%. Among the Arab countries, remittances make up 23.75% of GDP in the Lebanon (2007), and 21.7% in Jordan (Shakoori 2009, 4)¹¹⁰. As a recent survey among 176 Central Banks highlights, there are major differences in the estimate of the volume of remittances issued and received (Ratha, Irving, and Mohapatra 2010)¹¹¹.

According to the National Immigrant Survey of 2007, 39% of immigrants send remittances to their countries of origin. Only 20% of the immigrants who send remittances do so occasionally. The most common situation is for them to do so on a monthly basis (48%) or every three months (19%).

¹¹⁰ For the year 2009 a fall in employment of 30% for the Gulf countries and 19% for all Arab countries.

¹¹¹ 114 Central Banks answered the survey. Estimates vary by up to more than 50%, according to data from the survey and the International Monetary Fund (IMF). The degree of regulation of remittances is still weak in many countries.

Between 1996 and 2005, the employed immigrant population in Spain increased by 34%, but transfers of remittances recorded in the balance of payments only increased by 25%, and therefore they may have been underestimated. The income received in the principal receiving countries from Spain was between 15% and 20% higher than that recorded in the Spanish balance of payments, and this also points to an under-estimation of the volume. Consequently, the Bank of Spain opted to quantify the under-valuation and to review the definition of remittances and the means to put it into effect (IMF 2008, 78)¹¹². The Bank designed an approximation method for this purpose on the basis of the concept of *potential remittances*, which “means the highest level which an immigrant population can send as a function of its age structure, employment rate, and area of origin”. Or, in other words, the disposable income per immigrant and their propensity to make remittances, depending on the stock of immigrants (Tello 2006, 17). The Bank of Spain itself recognises that it is very difficult to make accurate estimates with the sources currently available, which are those which were employed in the preceding sections. The resulting figures are very volatile, and this volatility may be due more to the contextual social circumstances than to genuine changes in the magnitude of the remittances. Furthermore, transfers in kind are very difficult to detect, and some of them are made from third countries. From the point of view of those receiving the transfers, the heterogeneity of the procedures and accounting systems also make analysis difficult.

Although it is a basic item of data in the calculation of the remittances, the *stock of immigrants* has not been well understood for many years, with major differences between the principal statistical data (obtained from the local census registers) and other estimates. Naturalisations, the revision of the local census, and some *ad hoc* surveys have improved this starting point, but it continues to be difficult to estimate exactly the number of immigrants and their employment situation. Comparing the various different sources available, the composition of the employment structure, as analysed in detail in a sector with such numerical importance as household

¹¹² According to this source, in 2008 Spain had a debit in remittances by workers of Dollars 11,166 million, almost twice the credits which it received under the same heading.

employees, is rather unstable and inconsistent. The LFS offers figures for those employed by households which are four times greater than the number of household employees registered with the Social Security, which is supposedly mandatory. Furthermore, the increase in stock does not guarantee that the proportionality of the disposable income will be maintained. If the labour market becomes saturated, new immigrants will occupy lower and lower, and more marginal, levels, with fewer hours of work and less disposable income. With respect to the propensity to make remittances, the specialist literature indicates that this will reduce as a function of the increasing period of residence in the destination country. The distinction between altruistic reasons (remittances through solidarity, in order to contribute to the well-being of those who have remained in the place of origin) and reasons of personal interest (investments to improve the yield of savings) is pertinent, but no-one knows with certainty how many emigrants are guided by either type of reason, and still less in what proportions the two types of reason are distributed in terms of source or country of origin. In the National Immigrant Survey of 2007, only reasons of a general nature were mentioned, and altruistic reasons were not even collected explicitly.

All these points mean that in spite of being formalised in more or less complex equations and econometric models, estimates of the real volume of remittances continue to be risky; which does not mean that they should be made, quite the reverse. The conceptual preparation, the discovery of the deficiencies in the supporting information, and the search for imaginative solutions are the best combination possible to advance knowledge in this field, on the understanding that the precautions and the limitations within which the results lie are made explicit. The most salient feature of the Bank of Spain study cited above is the conclusion that a comparison between the potential remittances and recorded remittances suggests a possible under-valuation of 51% in the payments recorded in the balance of payment in 2001-2004 (maximum under-valuation), and that according to other estimates there could be an under-valuation of between 20% and 25%.

Table 6.13 shows the change in remittances between 2003 and 2008, and provides a historical view of the presence of migrant workers in Spain. Up until 2003, the balance of the remittances by work-

ers was positive (€ 1,276.4 million) and contributed to bringing transfers into balance, as they were negative under other headings. As from the following year, 2004, the balance of current transfers became increasingly negative and followed the same trajectory as remittances (Graph 6.3). The crisis of the year 2008 was reflected in a fall of 20% in remittances sent from Spain in comparison with the year 2007.

In the year 2009, 129,986 transfers of money which fell within the category of *remittances* left Spain through the Savings Banks. The majority were remittances by immigrants to their families in their countries of origin. On the assumption that the Savings Banks are a good reflection of the general trend¹¹³, it could be concluded that between 2006 and 2009 remittances in Euros became more and more important in comparison with remittances in Dollars: they rose from 19% to 37% of remittances. The average sums sent are modest, with an average of 73 for those sent in Dollars, and € 88 for those sent in Euros. This suggests that these are more contributions to subsistence, maintenance costs, or gifts rather than a transfer of savings for investing in their country of origin.

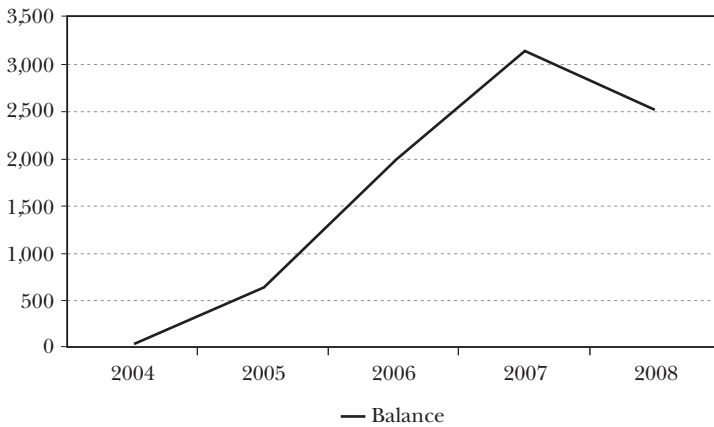
TABLE 6.13: Remittances sent by workers, 2003-2008
(Euros '000,000)

	Income	Payments	Balances
2003	4,172.6	2,896.2	1,276.4
2004	4,184.5	4,188.5	-4.0
2005	4,301.4	4,935.6	-634.2
2006	4,824.4	6,812.5	-1,988.1
2007	5,310.3	8,444.9	-3,134.6
2008	4,339.3	7,840.5	-2,501.2

Source: Prepared by M. A. Durán using data from INE (Banco de España 2009).

¹¹³ I am grateful to the Spanish Confederation of Savings Banks (Confederación Española de Cajas de Ahorro - CECA) who provided me with unpublished information about the number of remittances. With the available information the number of persons who make or receive remittances cannot be known.

GRAPH 6.3: Change in remittances from Spain (balance), 2004-2008
(Euros '000,000)

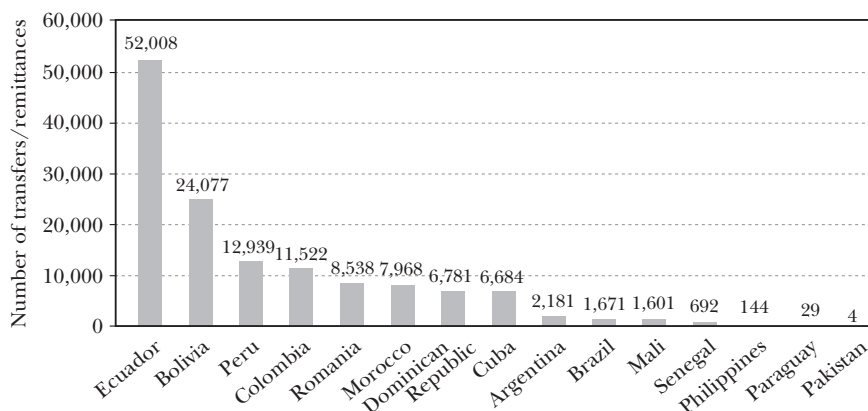


Source: Prepared by M. A. Durán using data from INE (Banco de España 2009).

Although the increase between the years 2006 and 2007 was spectacular, both in terms of the number of remittances and of the amount sent, the contraction of growth in 2008 was also strong. The flow did not continue in 2009, a year in which the total number of remittances shrank by 5% in comparison with the previous year, and the amount fell by 8% (Graph 6.4). Remittances have decelerated, but the economic crisis has not caused a massive return of immigrants because the conditions in the countries of origin continue to be comparatively worse (Jarspers-Faijer 2009).

6.3.5.2. The destination of remittances and the controversy about their contribution to development

Remittances are related to non-remunerated work in two ways. In the society which receives them, they compensate for the remunerated and non-remunerated work which is lost through emigration, and give rise to a redefinition of family relationships. For the society which sends them, it is a payment for the import of labour, and depends on how this payment is interpreted. One section of immigrant workers is employed directly in households, freeing up local labour to join the employment market in more qualified segments. Another section of immigrants is occupied in sectors which

GRAPH 6.4: International remittances from Spain

Source: Directors' Report 2008

are highly orientated towards the production of services for households, such as catering, cleaning, small retail shops, and personal services. The fact that they exist, or are made cheaper, frees up time which local labour can devote to other occupations. As recorded production increases, GDP increases. But it can lead to a fall in per capita GDP if the jobs in which the immigrants are occupied have lower remuneration than the average of all workers, or if the ratio of dependents is higher.

The arrival of remittances in a country depends principally on the stock of emigrants abroad, and also on the economic conditions in the destination country, on the time which has elapsed since the fact of emigration, on the exchange rates, on whether the migrant has taken their family with them, and on their expectations of going back.

If the expectations of a heavy fall in remittances did not become reality in 2008, it is because the emigrants did not undertake a massive return to their countries of origin. Quite the reverse, the average duration of their stay is increasing and the stock of immigrants continues to increase.

In some countries the interest rates which are offered are high in comparison with those offered in the countries of residence of the emigrants (for example, in the United States) and act as a strong

incentive to forward remittances. For example, remittances to India increased considerably towards the end of 2008 because of the increase in interest rates in that country. Fiscal stimulus can also act as incentives to forwarding remittances, in the same way as tax and duties can demotivate them.

The amount and the manner of carrying out the forwarding of remittances are associated with the family and social characteristics of the migrants. Women generally obtain a lower income, but they send their remittances on a more regular basis if they have left their family behind. The transfers are larger if minor children have stayed behind in their place of origin than when they accompany or rejoin their parents. When families come together again, remittances reduce, and their financial interest shifts towards their new society of residence (IMF 2009, 49).

Traditionally, migrants in an irregular or illegal situation have been reluctant to make use of formal procedures for forwarding their remittances, out of fear that their irregular situation may be discovered. As controls on transfers of money have been reduced, the differences in comparison with the procedures employed by legal immigrants have diminished (IMF 2009, 13). Not all of the money sent to their countries by emigrants is used to compensate the families who take care of their children, and to keep family infrastructures and networks alive; they are also used to pay off debts and to pay companies, but there is no doubt that it is a substantial part, particularly in remittances that are sent regularly.

The expansion in remittances at the beginning of the 21st century has highlighted the crucial role of financial infrastructures throughout the whole world. Moreover, it has changed the perspective of the phenomenon; remittances are now not considered principally as a transaction, but as establishing a client relationship between the remitter and all of the banking services, a point particularly important because many migrants have had very little part to play in the banking networks in their countries of origin (Garson 2005, 5).

Workers who go back take their savings with them. Tightening of the controls may delay remittances, but rarely eliminate them. The effect of the changes in value of the currencies on remittances is hard to foresee. The changes in the rate of exchange of the Dollar,

the Rouble, and the Pound Sterling have affected remittances coming from the countries which use these currencies, and the type of transfer. The same is true of changes in the interest rates which banks offer in the areas of origin and of destination of the remittances.

Barely developed economies depend heavily on foreign investment, official international aid, and the remittances of workers who have emigrated, which already exceed the Official Aid for Development as a proportion of GDP (WDI 2009a, 11). Economic crises are reflected in the remittances with a slight delay in time; for example, in the recent crisis, the effect of the fall in remittances to Mexico from the United States was only noted months after it commenced. A reduction in the income which arrives from abroad would not only affect expectations of development over the medium term, but also immediate daily living conditions. According to forecasts published in 2009 by the World Bank, the global economic crisis of that year may have pushed 46 million people across the severe poverty line of \$ 1.25 per day, and a further 53 million were added to the ranks of those who live on less than 2 Dollars a day. According to these forecasts, almost one half of all countries with low- or medium-income economies were likely to suffer the effects of the crisis, and the majority would not be able to gather together funds in their own country or internationally in order to counteract it. The expansion wave of the recession is punishing the most fragile and unprotected households with greater force, and within those households the people who run the greatest risk are the children.

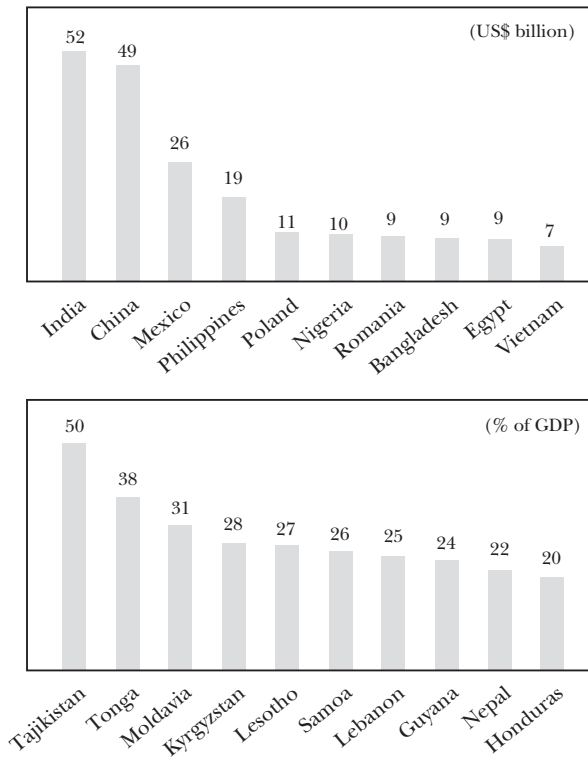
The forecasts of the World Bank and of other international bodies were so dramatic in 2008 and 2009 that they were difficult to accept from the relatively comfortable position of the developed countries, including those which were most affected by the crisis. "Many households will have to sell their productive assets, reduce on food, and take their children out of school, with serious and sometime irreversible effects over the medium term..." It was estimated that if the crisis were to persist, between 200,000 and 400,000 children could die every year (WDI 2009a, 12).

Fortunately, the expectation that the world economic crisis would make itself felt in a sharp fall in remittances did not fully materialise. For 2009-2011 the expectation of a recovery in the vol-

ume of remittances remains in place, although without reaching the high levels of the year 2008 (World Bank 2009b)¹¹⁴, and some estimates indicate that overall, all remittances to developing countries fell by 6.1% in 2009 in comparison with the year before (Graph 6.5). Remittances come principally from the rich nations, headed by the United States, Saudi Arabia, Switzerland, and Germany (Ratha et al. 2009).

The estimate of future remittances, and even of those already sent, currently presents considerable difficulty. Table 6.14 (Ratha,

GRAPH 6.5: Remittances by destination and proportion of GDP in respect of recipient country, 2008



* One American billion is the same as one thousand million.

Source: World Bank "Migration and Development Brief, November 2009.

¹¹⁴ In this report the forecasts for the reduction worldwide were only 6.1%.

TABLE 6.14: Prospects for the flow of remittances to developing countries, 2009-2011
(in billions of Dollars, US)*

Region	2006	2007	2008e	Basic forecasts		Low forecasts	
				2009f	2010f	2009f	2010f
Total	228	285	328	304	313	295	294
East Asia and Pacific	53	65	78	74	76	71	71
Europe and Central Asia	37	51	57	49	50	47	48
Latin America and the Caribbean	59	63	64	60	61	58	57
Middle East and North Africa	26	32	34	32	33	31	31
South Asia	40	55	74	71	74	69	69
Sub-Saharan Africa	13	19	20	18	19	18	18
Low income countries	20	25	31	29	30	29	29
Middle income countries	208	261	297	275	282	266	265
World	309	380	433	–	–	–	–

* One American billion is the same as one thousand million.

Note: e: estimated, f: forecast.

Source: Ratha, Mohapatra, and Silwal (2009).

Mohapatra, and Silwal 2009) shows the ways in which the experts are working with various different scenarios simultaneously. Throughout the world, estimates made by the same authors at various moments in time in 2007 vary between Dollars 285 thousand million and 289 thousand million; for the year 2008, between 328 and 338; and for 2009, between Dollars 304 thousand million and 317 thousand million. In proportional terms, the variations between estimates are greater in the case of regions and countries than for the world as a whole, because the changes do not occur with the same trend and intensity throughout and they compensate each other for this.

Experts indicated that there is a large volume of remittances because they come from very numerous stocks of emigrants, but each individual one of them is small because only a small part of the income of the emigrants is remitted. Among the Public Administra-

tion of the countries which export high proportions of emigrants there is a growing argument in favour of taxing remittances in order to obtain funds for the public treasury, as “compensation” for the fact that the emigrants left their country. This point of view maintains that the flight of the most productive members of the community brings with it an impoverishment of those that remain, the country loses its potential producers, and the proportion of those seeking public services increases while the resources of the public authorities do not grow enough to satisfy the demand.

As has already been indicated, the amount of each remittance sent from Spain is small, and the average does not reach € 100. Until the year 2004, transfers presented bureaucratic difficulties and informal procedures were used for preference. That year a platform of 31 banking institutions was created for forwarding remittances, coordinated by the Spanish Federation of Savings Banks (*Confederación Española de Cajas de Ahorro – CECA*). This platform of different institutions applies the official exchange rates of the Bank of Spain, and it remains within formal finance circuits until it reaches the recipient.

In the year 2006, according to a report by the association of remittance institutions (*ANAED 2006, 1-5*), it was estimated that there were 46 entities which had been authorised by the Bank of Spain. This report estimated that in 2006 the remittance institutions held a market share of 80% in Spain. The remittance institutions are subject to inspection by the Bank of Spain and by the Anti Money Laundering and Financial Crime Service (*Banco de España 2006*). It is a legal requirement that funds are delivered to their paying correspondent banks through the credit institutions, both on issue and on receipt, and they will receive an appropriate commission. The loyalty of their clients is based upon the many points for client acquisition, breadth and flexibility of service, speed (same day service, normally), security, and relatively low cost in comparison with the credit institutions. The average cost of the service of the remittance institutions, including currency exchange, is between 5% and 7%. According to the same source, the remittance institutions earned a profit of 0.27% of the volume remitted in 2004. The average sum of each remittance is small, but millions of remittances are made every year (*Remesesas.org 2012*).

The principal recipients of the remittances are the parents of the immigrants (62% of recipients), followed by the children (26%), and siblings (22%). Spouses or partners are not as common as recipients, both because many immigrants do not have a spouse or partner, and because their spouse or partner has come with them on their migration. In addition to parents, children, siblings, and spouse/partner, other relatives (13.8%) are also habitual recipients of remittances. Apart from the United States and Canada, where there are hardly any recipients of remittances sent from Spain, there is no appreciable difference in the type of recipient by country of despatch. The only country which differed visibly from the rest is Morocco, where forwarding to children is much lower (9.4%), and on the other hand the proportion of despatches to parents (77.4%), to siblings (26.2%), and to the spouse/partner (14.8%) is much higher.

The means most often employed for forwarding remittances, according to the National Immigrant Survey of 2007, is through intermediary agents (52%), followed by bank transfers (28%) and postal giro (14%), which does not imply that the sum of money is the same whichever medium is used.

The effect of the arrival of the remittances on the households which receive them is complex (Table 6.15). There is debate over the extent to which they contribute to development in addition to the reduction of poverty and the improvement in the well-being of the members of the family. The counter-cyclical effect of the remittances contributes effectively to development, because it increases when conditions in the country worsen. Various authors (Amedo-Dorantes and Pozo in 2006, in the case of Mexico, and Acosta in the case of El Salvador) have shown the complex effect of the arrival of non-earned income in households, which brings a reduction in the number of hours worked in the informal sector but increases the number of hours worked in the formal sector by the same amount (p. 6) (Table 6.16). In Nicaragua, Funkhouser suggests that it reduces the amount of informal work by women and increases access to small businesses in the men (p. 6). In the case of the Philippines, similar effects have been found by Rodríguez and Tiongson (2001). Currently, public policy attempts to integrate migration into development policies which converge directly in the achievement of the Millennium Objectives (Committee on Migration 2009).

TABLE 6.15: Addressees of remittances, by country of origin
(percentage)

	Total	%	Husband/ Wife or partner	%	Parents	%	Children	%	Siblings relations	%	Other relatives	%	Other person or institution	
Total	1,765,051	100.0	187,291	10.6	1,101,430	62.4	454,674	25.8	397,680	22.5	243,891	13.8	52,814	3.0
European countries*	444,348	100.0	32,986	7.4	263,377	59.3	110,376	24.8	78,165	17.6	67,718	15.2	17,940	4.0
EU-27*	374,694	100.0	28,673	7.7	224,122	59.8	85,281	22.8	66,514	17.8	57,757	15.4	16,118	4.3
Morocco	220,365	100.0	32,587	14.8	170,667	77.4	20,763	9.4	57,772	26.2	20,968	9.5	4,030	1.8
United States and Canada	577	100.0	0	0.0	197	34.1	0	0.0	0	0.0	0	0.0	380	65.9
American countries not including USA and Canada	887,536	100.0	72,546	8.2	528,109	59.5	262,554	29.6	194,321	21.9	131,268	14.8	26,409	3.0
Countries in Asia and Oceania	90,669	100.0	11,851	13.1	57,727	63.7	21,504	23.7	21,409	23.6	13,837	15.3	2,679	3.0

* Not including Spain.

Source: Prepared by M.A. Durán using data from the National Immigrant Survey (INE 2007). These are multi-dimensional data: more than one response.

TABLE 6.16: Means most employed to send remittances, by country of origin
(percentage)

	Total	%	Postal order	%	Bank transfer	%	Intermediary Agent	%	By other person	%	Other means	%
Total	1,765,051	100.0	243,984	13.8	497,952	28.2	918,319	52.0	76,822	4.4	27,973	1.6
European countries*	444,348	100.0	56,098	12.6	122,196	27.5	225,929	50.8	26,628	6.0	13,496	3.0
EU-27*	374,694	100.0	49,915	13.3	102,719	27.4	189,524	50.6	21,656	5.8	10,880	2.9
Morocco	220,365	100.0	41,427	18.8	27,459	12.5	132,298	60.0	14,226	6.5	4,955	2.2
Remaining African countries	121,557	100.0	14,979	12.3	17,778	14.6	71,170	58.5	15,451	12.7	2,178	1.8
United States and Canada	577	100.0	0	0.0	0	0.0	577	100.0	0	0.0	0	0.0
American countries not including USA and Canada	887,536	100.0	125,651	14.2	276,139	31.1	464,080	52.3	15,855	1.8	5,811	0.7
Countries in Asia and Oceania	90,669	100.0	5,828	6.4	54,380	60.0	24,265	26.8	4,662	5.1	1,533	1.7

* Not including Spain.

Source: Prepared by M.A. Durán using data from the National Immigrant Survey (INE 2007). These are multi-dimensional data: more than one response.

The debate upon the effect of the remittances has a theoretical interest rather than a practical one. The international institutions are attempting to rationalise systems for forwarding remittances, to make them more secure, cheaper, and more accessible, in addition to promoting specific channels of investment for migrants. Around 1990, the cost of the transfers was close to 15% of the value of the money sent, and it was less secure, while today the cost is approximately 5% (IDB 2009, 3).

No-one has any doubt that the remittances make an immediate direct contribution to increasing GDP and reducing poverty, but what is open to dispute is the indirect deferred effect on the propensity to work and the type of consumption/investment to which the funds received are directed. The propensity to employment has optimum bands but in circumstances of poverty or precariousness all potential workers, including children, old people, and the sick, seek a paid occupation. An improvement in the financial conditions unfortunately reduces the propensity to employment, and pushes it back to levels which are compatible with better living standards. The withdrawal of labour from the employment market in order to devote it to care can be interpreted as an anti-development factor; but this interpretation should lead to the questioning of the pertinence of a social or economic model which does not leave room for the care of people who cannot care for themselves (children, the sick, and the elderly).

7. Contracting substitute work in the home

7.1. The theoretical and political interest of paid domestic work. From expansionary contracting to substitute contracting

The International Labour Organisation (ILO) estimates that close to 100 million workers throughout the world work as domestic employees for households. This figure is large enough, at more than twice as large as the total population of countries like Spain, to evidence its political interest. Although there are striking differences from one country to another, these are workers who occupy a low place in the scale of working conditions, and frequently combine four qualities which make them more fragile than all other paid workers: they are women, they come from disadvantaged family environments, they are immigrants, and they lack strong and effective representative organisations. If their political interest is less than their humanitarian interest it is precisely because they lack instruments for financial, not to mention legal, negotiation similar to workers whose contribution is necessary for the production of goods, since they work in isolation for households.

On the theoretical level, paid domestic work is of extraordinary sociological and economic interest. It lies on the frontier between the capitalist production system, which generates goods for the market, and the family production system, in which goods and services are produced and consumed in the household. While the market has received an enormous amount of attention, family production has barely sparked the interest of analysts who have ignored it

or have considered it to be a residual economic sector on the route to extinction. But it is not so, and the production of services continues to be firmly located in households although there are no conceptual tools or empirical databases to analyse it. That is why paid domestic work will be studied in great detail in this work, and we will attempt to locate it in its role as the pivot point between the labour market and the demand for services which are carried out by, or could be carried out by, households.

Households are economic units which sell and purchase work. The space occupied by the household serves not only for the accommodation of its members; in traditional societies, a sizeable part of the goods produced for subsequent sale were produced in households, and there was no clear special frontier between the living area, the workshop, and the farm. In industrialised societies, the function of production for the market was shifted to factories, offices, and markets, although small proportions of households persist in which the area of accommodation overlaps with that for the production of goods and services for those outside the household.

And in the same way as they sell work, households also purchase it. They do this directly and indirectly. They purchase work indirectly when they acquire goods or services in which work has already been incorporated, and directly when they hire workers to produce the goods and services for the household itself. The work which households purchase directly from workers from outside the home can be applied to the production of goods and services which are subsequently re-sold or consumed entirely by the members of the household.

The National Accounts provide, or at least intend to provide, a completely different treatment to the work which households purchase for resale from the work they consume, although at times the frontiers between one and the other are far from precise. The work purchased in order to incorporate it into goods and services which are subsequently resold is considered to represent *production*, while the work which is applied to the direct satisfaction of the needs of the members of the household is considered to constitute *final consumption*. The National Accounts assume that all of the services which households consume are produced or distributed through the market and/or through the State, because they do not consider

that what is produced and consumed by the members of the household themselves constitutes a service. This is a conceptual inconsistency which requires reworking, because the same activity (for example, heating up a cup of coffee) has a completely different treatment if payment is involved or not.

Workers hired by households for agro-pastoral production, small shops, or workshops cause many difficulties for the National Accounts. Frequently these are family helpers or are hired on a temporary and discontinuous basis, and belong to the informal economy. In many cases, it is the women who contribute this work to the family economy, badly paid and worse valued, but indispensable for subsistence, which we have already talked about when we analysed the non-observed economy (NOE) of the developed countries. Although there is some confusion in some classifications, and in spite of the fact that they straddle the two systems of production, household production and market production, these workers conceptually belong in the monetarised economy, and their work is paid, and therefore we shall not be dealing with them in this chapter.

There is no limit to the needs of households, or to the quantity of work which they purchase in order to satisfy them. The limit is only set by their purchasing power, and the social or legal rules which regulate them. Any of the functions which are normally satisfied in households (accommodation, company, food, education, security, gender, social representation, etc.) may be expanded to an infinite extent if the household has sufficient resources. They may also be reduced so much that they disappear completely, if the resources are not there. The history of literature, the cinema, or painting are full of references to households which are not even able to satisfy their minimum life needs, which do not offer the indispensable food or hygiene to guarantee physical survival. And there is also plentiful evidence of households which absorb other households in order to produce exquisitely refined and specialist services for the consumption of all or any of the members of the principal household.

Domestic work purchased by households is divided into two major categories:

- a) Work for the production of services in addition to those of the members of the household (expansionary hiring).

- a) Work in substitution of that of the members of the household (substitute hiring).

Rather than an abrupt division, this is a continuum where services of absolute necessity are found at one end (for example caring for a baby), and luxury services are found at the other end (for example the service offered by a valet who prepares the clothing for the next day). The subjective definition of need is evidently highly elastic. Even though the members of the household may be capable of carrying out some functions as effectively as a good paid professional (for example, cooking, official business, or decorating), the services of luxury production cannot be provided by the members of the household — they are luxuries precisely because they are provided by paid staff —. In the developed countries, luxury services are frequently shifted outside the households, to the market, although this does not happen so much in the developing countries. Expansionary hired services are those which extend the functions previously carried out by members of the household, both in quantity and in quality. Among these a special role is held by the production of luxury services for domestic consumption. Substitute services are those produced by delegating tasks, and the most frequently delegated are those of a physical nature which require little qualification (cleaning, ironing) or those which are unavoidable and incompatible with the working day of the members of the household (caring for small children, and caring for dependent adults). The delegation of tasks is frequent in middle-class households in which there are small children or sick people, where the adult members are engaged in the employment market and do not have access to public services which are accessible and of good quality for the person cared for^{115,116}.

¹¹⁵ The 1985 Report on Family and Domestic Inequality, permits a view of the progressive reduction of the employment of paid employees in households in Spain over recent decades, and the variation by social class, level of income, and employment of the principal person responsible for the household. At the highest level of income, at that time 69% of households had some type of paid domestic help. In those households where the housewife had a paid job, the frequency of domestic help was three times the national average. (Durán 1988, 145: 193.).

¹¹⁶ According to the CIS, Study no. 2766 of June 2008, in 7.6% of households small repairs were given to paid workers; cleaning in 5.5% of households; the laundry in 2.2%; and the cooking in 1.5%.

7.2. The reduction of the work in the household and its transfer to the State and to the market

Halfway between the household and the labour market, the workers who take care of other households are in a peculiar social and financial position, which is not completely family (although sometimes it is very similar) or professional (although sometimes it is almost completely so). The historical origin of domestic work is inseparable from societies without equality, in which families with economic and political power formed complex social groups which included a large number of servants. The “family” itself is defined in Roman law as the group formed by the *pater*, or master, and his *famulos*, or servants. The family is also historically linked to the domestic system of production, in which the principal economic units were the *oikos*, or household (the etymology of the word “economy” in fact comes from this), which produced not only personal services, but also the greater part of the goods intended for self-consumption and exchange. In extreme cases, domestic work was performed in circumstances of deprivation of liberty and absence of pay, like a form of slavery. Nevertheless, with the arrival of modernity, the economic system concentrated on the family has been displaced by companies, and extensive family networks which combined protection and economic exchange have lost importance, and social equality has become a principal of the highest level which inspires the political system. In these new economic and political circumstances, which had become universal at the beginning of the 21st century: What sense is there in the continued existence of jobs for the production of services in households? Why does it persist not only in the developing economies, but also in the developed economies? What is the limit to the capacity of households to contract remunerated work?

If the working conditions of domestic workers are compared internationally, they are generally worse than those of the members of households which hire them, but better than those of a part of the remunerated and non-remunerated workers throughout the world. What makes paid domestic work difficult is not so much the work itself, as the permanent demonstration of the social difference between the employers and the employed. In some types of domestic work which are beginning to become common in countries with

an advanced state of well-being (for example the care of dependent elderly people who live alone), the traditional relationship of the subordination of the worker with respect to the person receiving the services disappears, and the worker acquires an employment status similar to that of a government employee in the social services, with an income higher than that of the household for which they work.

The isolation from other workers and the difficulty in achieving collective negotiation are the two conditions which place domestic workers in a fragile situation in the face of the employment market. Unlike other workers, their work is not resold, and therefore they cannot orientate their negotiations towards their contribution to the generation of profits; they can only orientate it towards the previously accumulated wealth of their employers or towards the income from employment which they would lose if the worker's contribution of services to the household were to be interrupted. The first situation is very evident in households which possess considerable wealth or high incomes, and is striking in terms of social justice. Nevertheless, this type of household is not numerous. Paradoxically, they are proportionately more abundant in developing countries than in the developed countries. The second condition frequently occurs in the middle classes in the developed countries, in households with two salaries and young or sick children who do not make use of the public substitute care services, and depend heavily on the incomes which the two spouses contribute. In these households the negotiation of the working conditions, including the salary, not only is against the background of the personal wealth of the members of the household in which the employee works, or the value contributed by the worker in immediately liberating the capacity of one or other of their employers to work; the consequences of the total or partial absence from work over the medium term (return, promotion) are also in play, or the manner in which it affects the households of the emancipated children. It is not uncommon that the substitute cost is in excess of the income of the person receiving the services, and it is made up with contributions from family members in other households.

Since the 19th century, households have been reducing functions throughout the world, absorbed into a booming international market and States which have also become expansionary. In the year

2010, the majority of the goods which are consumed by households all over the world were purchased in the market, although there are some regions in which households continue to produce a large part of the food which they consume. With respect to services, the welfare state has assumed many of the functions traditionally carried out by families in respect of education, healthcare, and public safety, while the markets have expanded into offering goods and services in food, accommodation, clothing, leisure, transport, and social representation, especially in urban areas and for households with medium to high incomes.

As has already been indicated, the production of goods and services in households has no other limit than the available resources and the existence of more efficient alternatives. If the market or the State offer better alternatives, households will receive or acquire what they need through them. If there is no alternative, households produce those goods and services for themselves within the household itself, or reduce consumption as far as is demanded by their lack of resources.

Domestic workers are a very numerous group on a worldwide level, and in some countries they make up as much as 16% of the female working population (SEPM 2010; Zepeda 2009)^{117,118}. The number of domestic workers as a proportion of the entire working population in the world has diminished¹¹⁹ as the differences in income between households has diminished and the production functions of households have been transferred to the market and the State.

Nevertheless, in spite of the general tendency to fall, other factors causing a movement in the opposite direction have slowed that

¹¹⁷ The legacy of a class-based past and racial discrimination contribute to the fact that this continues to be one of the principal routes of entry to the employment market for black women in Brazil.

¹¹⁸ One out of every four urban women in employment in the lowest quintile in the twenty Latin American countries analysed were working as domestic employees. The figure is more than one half in Paraguay, almost half in Brazil, and one third in Chile, rather more than one fifth in Costa Rica, and rather less than one fifth in Venezuela.

¹¹⁹ Domestic workers continue to be a very numerous group of workers in Latin America. It is estimated that in Brazil there are more than 6.2 million domestic employees, for the most part under very poor working conditions, which is a population greater than some European countries (SEPM 2010, 29).

trend, and have even reversed it in some countries and social groups. These trends in the opposite direction are:

- a) The maintenance of significant inequalities in income at an international level, and the scarcity of jobs in the undeveloped countries or regions.
- b) The cheapening of labour and the ease of travel for workers.
- c) The entry of women into employment in the developed countries.
- d) The aging of the population and the massive dependence of the elderly in the developed countries.
- e) The difficulty in increasing the yield and productivity of proximity services, which require close collaboration between those who provide the services and those who receive them.

The proportion of remunerated domestic work in comparison with the total work produced in households is very small on a world-wide and regional scale, but it is high in households with very high incomes and among some social groups with medium and medium/low incomes in which the demand from children, the sick, and the elderly is concentrated and they use it on a temporary basis.

In Spain, the Ministry of Labour and Immigration considers that domestic workers are workers who provide domestic services for the head of a household in the family house and receive remuneration for that. Their legal situation is governed by the Special Regime for Domestic Workers, and includes work in childcare, gardening, and driving vehicles, if they are carried out as part of the domestic tasks (Ministerio de Trabajo 2010). Our estimate on the basis of the available data is that remunerated domestic work time is equivalent to less than 1% of time devoted to the non-remunerated work produced in households.

7.3. Inequality between countries, inequality between households, and inequality between workers

Globalisation has brought with it the possibility that not only companies and States, but also households can expand their networks at

an international level. While there exist big differences in income between regions and social classes, workers will leave their places of origin in their search for better opportunities. The opportunities come principally from the labour market, but those offered by welfare states in education, healthcare, housing, and social assistance services are also important. Other benefits without an immediate match in the economy, such as liberty, security, or equality between the genders can play a decisive role in some types of migration, whether internal or international.

Map 7.1 shows the distribution of per capita incomes throughout the world, an issue which was also dealt with in Chapter 3. Although the differences would be reduced if the price index or purchasing parity was applied in each case, they continue to be so large (372 times higher in Luxembourg than in Eritrea) that they are sufficient in themselves to predict that the displacement of workers will continue to occur over the coming decades. Within each country, the differences in incomes between regions can be as great as the international differences. The lack of opportunities for employment pushes the population out towards the more prosperous regions. For the year 2010, it is estimated that 10% of the richest households in the world will receive 29.5% of the total of all of income received by households, while the lowest decile will only receive 2.5%. (World Fact book 2010).

MAP 7.1: Countries, GDP per capita (PPP), year 2008



Source: International Monetary Fund World Economic Outlook Database, April 2009.

Wealth and poverty are always relative terms. A household with an average income with respect to its own country would become a rich or very rich household if it were to be compared with households from other countries in which the average income is very low. Although at the local prices of labour this household could not afford to buy external work, at international prices it could hire a good number of workers and put them into the production of domestic services. Unlike in earlier periods, currently travel does not entail particular risks or suffering. Nor are the exchange of information or dealing with hiring difficult; both the market and some governments have created organisational structures to satisfy this function, and have converted it into a lucrative intermediary business or into the public activity of the control and handling of immigration. In any circumstances, if the labour market were to be really open on a planetary scale, the movements from undeveloped regions into the developed regions would intensify by an extraordinary amount, and part of the migrant workers would be employed in the households of the developed countries in order to produce domestic services, or in the high and medium income households in developing countries.

The principal cause the limitation of population movements, and more specifically the increase in the number of remunerated workers in households, is the desire to protect labour markets in the developed countries by the workers themselves once they have become established. If it is not supported by a simultaneous expansion of the economy, opening up the borders would cause wages and salaries, and the working conditions which have been won after many decades of economic growth and negotiation between workers, employers, the State, and the rest of civil society, to shrink.

In addition to the regulation of local labour markets, there are other factors which contribute to the limitation on the import of labour in general and of labour for households in particular as well as the values advocated by self-sufficiency and individualism; but they are less important in comparison with the underlying economic motives already discussed. In fact, in capitalist, or free market, societies, all of the services which are no longer made in the households can be acquired in the market if there are enough money financial resources, in a range of sophistication which could never have been achieved before in households. By way of example, lunch in the Japanese res-

restaurant “Masa” in New York is worth slightly more than three hundred Euros per head, not including drinks, and this is not unusual. The same money is what it costs to spend a single night in a luxury hotel in some countries with a mixed socialist-market economy, reserved exclusively for the use of those who can pay for it in currency.

Regulating the employment market serves to set the minimum conditions under which other people’s labour can be bought, but it does not create employment. In other words, it determines the starting costs for employers, who have to limit themselves to activities in which they can resell their products at a greater price than what they cost them. Not all people who hope to sell their labour manage to find a job as good as they had expected, not even up to the level of the rights which many countries (including Spain) recognise in their Constitutions as a fundamental right. If the worker combines several different social disadvantages (coming from a low income household, being a woman) it is highly probable that they will not find jobs in which their work can be resold at a profit by the employer. In this case, their alternatives for survival are:

- a) depend on their own family, in cases where the family can and wishes to take this on;
- b) help from the welfare services in cases where there is cover;
- c) self-exploitation, becoming a self-employed worker;
- d) working outside the law under worse conditions than those established by law.

Evidently, both governments and social movements wish to produce structures which will offer the best working conditions possible for all workers. That is not where the debate lies, but on what are the best means of achieving it, and what positions should be adopted until such time arrives.

7.4. The proposals of the International Labour Organisation on remunerated domestic work

On 16 June 2011, after a process of three years’ discussion, the Domestic Workers Convention (2011) was approved, together with the

accompanying Recommendation. This took place during the 100th ILO Conference, with the votes of 396 government delegates, workers, and business people in favour, 16 votes against, and 63 abstentions. In the words of J. Somavia, the Director General of the ILO, “for the first time the system of regulations of the ILO has been brought to the informal economy, history has been made”. The new regulations will become Convention No. 189 of the ILO, and basically consist of putting domestic workers on the same level as other wage-earning workers. After it was approved, the convention was ratified by the States, and they will have to bring their own legislation into line with the convention.

The ILO has the objective of defending the working conditions of all workers: it can encourage governments to approve regulations to control it, but it does not have the capacity to create alternative employment to better satisfy the needs of workers and potential employers. The ILO has been repeatedly calling attention to the situation of fragility of domestic workers (1948, 1965 y 1970). This does not mean that they do not also understand the existence of the opposite situation, in particular when the employer is an elderly or sick person without living family, or when the employee looks after children in the absence of other members of the family. Fear of abuse within the household itself is one of the principal causes of refusal to hire domestic employees in the developed countries. In their study *Decent work for domestic workers*, the ILO underlines that in many developing countries domestic work occupies a considerable proportion of female labour, and that there is a great deal of child labour in this sector (ILO 2009). They also point out that over the last two decades, the number of domestic workers has increased everywhere as a consequence of the “massive entry of women into the work force, the aging of societies, the intensification of work, and the frequent lack of suitable political measures to facilitate the reconciliation of employment and the family”¹²⁰. In the developing

¹²⁰ UNICEF has also launched a worldwide awareness campaign about child labour, especially domestic work. For example, it is estimated that in Haiti there are some 173,000 *restaveks*, the name given to children who “stay” (*rester avec*) in other households in order to help in the domestic chores, and they comprise 8% of those aged between 5 and 17 years old. (News item published in www.unicef.org, by Viviana Fernández and Linda Tom, on 20 April 2007.)

countries, domestic workers make up between 4% and 10% of the work force, while in the developed countries they form only between 1% and 2.5%. Women always have a majority role in this sector, more than 70% in developing countries and more than 90% in the developed countries. If these indices are extrapolated to the worldwide working population, it could be concluded that there are currently more than 166 million domestic workers, of which 11.7 million live in developed regions, and 154.9 million in developing regions. 10.5 million of the domestic workers living in developed regions and 108.4 million of those living in developing regions are women¹²¹. In all, there are 118.9 million women who are domestic workers, and 47.7 million men who are domestic workers¹²².

In order to avoid potential abuse against domestic workers (child labour, withholding documentation, excessive working hours, confinement, physical or sexual abuse), the ILO proposes that the work and social protection of domestic workers should be regulated, and that they should be treated in the same way as workers whose occupations in the labour market are outside the households. In particular they claim the right of association and collective negotiation of working conditions, in order to prevent the “semi-family” status and the pressure deriving from physical proximity in the relationship between employers and employees.

As an indicator of the intended formalisation and “professionalisation” of domestic work, the preparatory document issued by the ILO contains a detailed consideration of terminology; it rejects the

¹²¹ It has been estimated that the worldwide working population is 70% of the population from 15 to 65 years old. There are 835 million people in this age group living in the developed countries, so it works out as 584.5 million working people. If an index of 2% is applied to this figure, it means that there are some 11.7 million domestic employees working in the developed countries; of these 10.5 million are women and 1.2 million are men. There are 3,688 million people aged between 15 and 65 years old living in the developing countries; applying the index of 70%, there is a working population of 2,581.6. If an index of 6% is applied to this figure, it means that there are some 154.9 million domestic workers, of whom 108.4 million are women, and 46.5 million are men. (United Nations, “World Population Prospects: the 2008 Revision Population Database”.) The World Factbook estimates the working population of the world in the year 2009 at 3,184 million persons.

¹²² Other estimates appearing in various different reports for the ILO give a number of domestic employees throughout the world as between 53 and 100 million.

use of archaic terms such as “maid” or “servant”, but also rejects other recently employed terms which are based upon the idea of “help” of “home care” (ILO 2009, 15).

With respect to employers, the ILO shows the existence of very varied situations. For the most part they consider the employer to be the person in the household who is responsible for the payment, but in some legislations, the employer is the entire household as a whole, or it is accepted that the employer may be a third party, even a company which provides services to households. Nowadays, there are a great number of Conventions in respect of work which explicitly exclude domestic work in any of its manifestations (au pair, etc.) from their remit, or from any of the inherent rights (paid holidays, part-time working, maternity protection, etc.) (ILO 2009, 22: 31, 34, 35).

The ILO pays particular attention to the legal aspects (the existence of governing laws) of the following working conditions¹²³:

- a) *Working hours*. This is the principal bone of contention in domestic work. The ILO indicates that the majority of countries “have not considered this issue in detail, although some effort has been made to establish a balance between the needs of work in the home and working hours which satisfy international standards” (ILO 2009, 46). The timetable and hours of domestic work have given rise to considerable debate and legal tussles in respect of the time on site, availability, night-time working, and the right to rest.
- b) *Minimum wage*. The establishment of minimum wages in order to prevent private agreements which prejudice workers and also prejudice the wages of other workers in this field. The ILO recognises that this issue is complex and crucial, because “domestic workers are structurally dependent on the degree to which households are able to afford domestic work”.

¹²³ Béatrice Ouin, in her analysis for the European Economic and Social Committee, highlights that there are human aspects which are even more important than the material and legal aspects, such as the mutual respect between employees and employers, something which is inherent in jobs in which the employee is handed the keys to the house, the babies, and the dependents.

- c) *Payment in kind*. The ILO underlines that the employment model should seek the independence of the worker, and ensure that their wage is sufficient to cover their necessities and those of their family. For this reason they call for the greatest attention to this feature. In practice, payment in kind is resolved in each country by reference to usage and custom, and when it is regulated, it may be equivalent to up to 60% of the wage. Notwithstanding its reservations, the preparatory report by the ILO does not go so far as to ask for it to be prohibited, because it is “traditional” and “in some cases it permits domestic workers to come through crises better” (ILO 2009, 39).
- d) *Living standards*. This refers above all to workers who live in the home of the employer. Current legislation in respect of food and privacy, hygiene in the accommodation, and freedom of communication with the exterior is very varied.
- e) *Frequency and regularity in the payment of wages*. This should not exceed one month when based upon annual or monthly remuneration, or one fortnight when on the basis of remuneration per hour or per day.
- f) *Standard contracts with legally approved forms*. Specification and reduction of the trial period, which in some countries is as much as ninety days and has legal repercussions on the work permits of immigrant workers.
- g) *Termination of contract and dismissal*. The causes for which the agreement may be terminated, the notice period, and the option for financial compensation in substitution are some of the issues analysed by the ILO, which finds a great variety of situations in different countries. Some causes of termination recognised by legislation in respect of domestic workers such as the illness or death of the employer are not usually recognised in the case of other types of worker. In many countries it is not required to adduce a valid reason for the termination of the agreement, even when a notice period or indemnity are required (ILO 2009, 54). The notice period also frequently depends upon the prior duration of the employment relationship. Dismissal has particularly serious consequences for immigrant workers, whose legal resident status is associated with the existence of an employment agreement.

- h) *Personal promotion and professional career.* The ILO promotes personal (following training courses) and professional promotion (recognition of skills and degree of qualification) for domestic workers, so that it is not considered to be a transitory poorly paid job but a career or profession like any other.
- i) *Tightening of labour laws.* Inspection, access to specialist tribunals, awareness campaigns, refuges for cases of maltreatment, associations and unionisation, bilateral negotiation between source countries and destination countries (ILO 2009, 77 et seqq.).

The intense activity of the ILO and other international organisations in order to regulate working conditions does not prevent social practice and legislation from frequently marching at a different pace, and even in different directions. The ILO is contributing to the empowerment of wage earners to generate public opinion and to apply pressure to national legislatures, but it cannot change the differences in power between the genders, social classes, and countries, by law. As has already been indicated, the financial capacity of households is a limiting condition to all improvements in working conditions for domestic workers, given that they involve a financial component whether directly or indirectly. Not only the wages, but also the working hours, maintenance, the quality of the accommodation, promotion, or the time devoted to technical training are manifested in the immediate short term in costs for the employers which affect their own capacity to hire staff. Professionalisation would be well-received by employers if it were not manifested in an increase in wages which would make the contract unfeasible or make it only available to very high incomes.

The rights relating to *social protection* are of particular economic importance, as well as political importance. In many countries, social protection is only extended to a small part of all workers, who are the employees of formal companies. The other workers, the self-employed, and those occupied in the hidden, or informal, market do not enjoy these rights, and therefore it is difficult to extend them to domestic workers. Nevertheless, in some areas such as Latin America, the proportion of domestic workers who contribute to the

Social Security increased visibly between 1990 and 2003 (from 17.6% to 23.3%). The ILO indicated the professionalisation of domestic work and the increase in the number of households headed by women as a cause of the increase in cover. This progress has not been followed in other regions, and as an indicator, it is highly dependent upon the poor quality of the data on domestic work. What can be asserted without any doubt at all is that throughout the world a new type of *substitute domestic work* has appeared in place of the traditional *complementary domestic work*. It is not employment to add services to the household, related to greater comfort or luxury, but it serves to permit the members of the household, and above all the woman who is considered to be responsible for the household, to keep their jobs in the local labour market, or to ensure care for the elderly or the sick which neither the family, nor the market, nor the public services can offer them.

Social protection includes safety and healthy working conditions, accident insurance, general health insurance, unemployment and retirement cover, as well as maternity protection and reconciliation of family life, with the appropriate leave for such purposes (ILO 2009, 59). The situation varies very much between countries and in many cases depends on the number of hours each month which the employee is working for the same employer and the continuity of the relationship. If the worker only does a part-time day, the complete Social Security cover may have an equivalent cost for the employer to the wage they would have to pay for a full day, and this is dissuatory. The ILO highlights the necessity of improving rights related to maternity leave and guaranteed return to the job, but found that regardless of what is laid down by the law pregnancy is frequently a cause for dismissal in many countries. The report drafted by the ILO says nothing about other rights which have recently begun to be recognised for workers in the developed countries in order to facilitate the reconciliation of family and working life. The implementation of these rights (for example, for the care of dependent family members) will be particularly difficult for migrant domestic workers who come from societies with different family and institutional structures from those of the countries in which they work, and whose dependent family members are resident in different places.

7.5. Negotiation on multiple fronts. The point of view of the associations of domestic workers and the impact of the Law on Dependents in Spain

In negotiations between business owners and workers in private companies, the potential conflict of interest is polarised between two principal players, represented by their respective employers' and union organisations. The State only intervenes when the conflict is not resolved by means of ordinary negotiation. Nevertheless, in the negotiation of the working conditions of domestic workers, the situation is much more complicated because there are no organisations which clearly represent the employers and nor are the majority of the workers involved in union organisations¹²⁴.

During the year 2009, the INSTRAW (International Research and Training Institute for the Advancement of Women) and UNIFEM (United Nations Development Fund for Women) promoted a series of debates on domestic work in which wider questions were posed than those already quoted from the ILO report¹²⁵. Among other topics in these debates, there were discussions on urbanisation and the development of cities as places in which care can be shared. For example, some discussions focussed on the need to disassociate the existing links between the fact of being a woman and the moral obligation to provide care.

In the activities organised in Spain, the general debate was orientated towards the search for a change in the social, legal, economic conditions of household workers¹²⁶ which will permit them

¹²⁴ The number of members of the CC.OO. (one of the two majority trade unions in Spain) in the domestic workers sector "is 1,500, almost all foreigners, which is an indicator of their low level of membership" (González Enríquez 2008, 99).

¹²⁵ INSTRAW. Material prepared for the "Right to Care? (¿Derecho al cuidado?)" Conference (23-24 October 2009) and "A just place for domestic work and workers. A dialogue between workers, unions, and the Government" (Un lugar justo para el empleo de hogar y sus trabajadoras. Diálogo entre trabajadoras, sindicatos y Gobierno" (17 November 2009).

¹²⁶ In this summary, which is necessarily abbreviated, an attempt has been made to present the principal points in the documents as faithfully as possible, and the references which might give rise to the greatest controversy have almost always been quoted literally. The documents are public and were distributed to those attending the event on 17 November, together with the materials prepared in advance by a range of different organisations.

to get on an equal footing with other wage earners. Representatives of the CEOE, the employer's representative organisation, were not present at the preparatory meetings, because they understood that the issue was not within their remit. Nor did any representative organisation of contractors play an active part, because they do not exist as such, and those which could come closest to them, such as consumer or housewives' associations, do not identify clearly with this social role. In fact the conference which served to round up the debates was entitled "Dialogue between workers, unions, and the Government".

Although they were not mentioned, a very active role was played by some NGOs and non profit making organisations which have extensive experience, not without tensions, in the domestic workers' sector. Traditionally, it was charitable and religious organisations, rather than political or union bodies, which have taken an interest in this sector because of its disadvantaged character, on occasions acting as intermediaries between employees and employers. This type of modernised NGO continues to play an important role in some countries and regions, although nowadays other types of non-religious NGO with a more social and political character are also very active¹²⁷. In line with the direct involvement with the workers of the sector, the search for more general analytical frameworks and proposals for organised collective action, we should point out the groundbreaking and preliminary nature of the meetings organised for Caritas in Albacete in 2005 and in Madrid in 2006, together with the Platform for Health Workers' Associations (Plataforma de las Asociaciones de Trabajadoras del Hogar – PATH), which were the source of a subsequent publication. This publication is a set of working documents and action proposals prepared by different associations, unions and representatives of public bodies (Aganzo and Galletero 2006, 48).

With respect to the future of work in households, the heading devoted to the estimate of the potential for generating employment

¹²⁷ Back in 1990 the Workers' Christian Movement (Juventud Obrera Cristiana - JOC) financed and published the Research Report, carried out by the Colectivo IOE, *Domestic Service in Spain. Between invisible work and the hidden economy – El servicio doméstico en España. Entre el trabajo invisible y la economía sumergida*.

in the national dependence system is particularly important. The forecasts for 2010 are shown in Table 7.1.

In Spain the unions have little tradition of membership among domestic workers, which is aggravated by the fact that they are in their majority women, they work in dispersed and inaccessible workplaces, their hours of work are not particularly compatible with the services offered by the unions, and, moreover, they are more and more from cultures far removed from those of the leaders and representatives of other workers. Explicitly or implicitly, racial and indigenist demands are coming into the core of the traditional demands of the workers' movement. While immigrant workers are able to become integrated by means of merging into the group in large industrial and hotel establishments, integration with workmates is difficult in the case of domestic work. The majority work in isolation from the rest, and it is the immigrants who define the sector on a social level, especially those who work full time or who live in the same household where they work. Given that women make

TABLE 7.1: Forecast job creation by national dependence system in 2010

	Number of jobs equivalent to full-time
Forecast net direct job creation	262,735
Estimate of induced job creation in construction, adaption, and fitting out of new resources	20,000
Estimate of indirect job creation (suppliers of centres and services)	40,000
Estimate of legalisation of hidden employment	80,000
Potential job creation attending to persons needing help in carrying out household tasks and/or with moderate disability for some basic activity in daily life	50,000
Estimate of job creation deriving from the implementation of the National Dependence System	452,735
Carers of family members who could enter the job market	115,000
Other potential effects on the activity rate	115,000

Source: Aganzo and Galletero (2006, 48).

up the immense majority, the workers in the sector have generated a great number of small assembly orientated groups in order to channel their demands. They avoid direct confrontation with their employers, because they know that the purchasing power of households is very limited, and their strategy is orientated towards achieving what the market does not provide from the State. This is not an unusual strategy, because in the Spanish economy there is a long tradition of loss-making sectors (agriculture, mining, transport, etc.) which have been maintained by the State by means of resources transferred from other more productive sectors and from households.

With respect to their own representatives, the domestic employees' associations and platforms are facing a difficult problem. A large proportion of the work carried out in this sector is in the informal market, and a large proportion of the workers are in irregular circumstances, without a work permit. In favourable economic circumstances, irregular or undeclared employment does not incite great hostility from other workers or the unions, above all if those jobs are located in the least valued segment of the labour market. In moments of crisis the situation changes drastically, and competition for employment, even for jobs which were previously rejected, accentuates latent social conflict. The representatives of household workers cannot demand rights only for regularised workers because they would lose the support of their base membership, but inasmuch as they defend workers who are in an irregular situation they weaken their own negotiating power. The existence of such a large contingent of irregular or undeclared employment is evidently a problem for those in charge of labour matters, and making it legal would involve a considerable improvement in employment figures, but the use of drastic inquisitorial procedures would have a high financial and political cost.

Negotiation between social agents in respect of paid domestic work has become even more complex following the approval of the Dependence Law¹²⁸, which raised extraordinary expectations as to the transfer to the State of part of the responsibility for the care of

¹²⁸ Law 39/2006 on the Promotion of Personal Autonomy and Attention for Persons in a State of Dependence.

dependents which has traditionally been assumed by households. The needs of dependents are quite different when it comes to working with the disabled or with the elderly. The disabled have won a fair degree of success by means of socially very active organisations, and their principal objective is to reduce their dependence and achieve greater personal autonomy. They are numerically few in the context of all of the potential beneficiaries of the law on Dependents, but they occupy a significant place in negotiations because of their capacity for mobilisation and pressure. On the other hand, elderly dependents are very numerous, but they lack organisational power. They do not have the impetus which comes from fighting with their whole life in front of them, but are already at the end of their life cycle and without any expectation of improving their physical circumstances substantially.

The Dependence Law provided that attention for dependents should be carried out by professional people from outside the household, and only on particular occasions by family members themselves; and this meant the opening up of an enormous pool of jobs. Nevertheless, the expectations have come crashing down both because the cost of care is greater than expected and because of the economic crisis, which is making it necessary to divert public and private funds to the unemployed. Domestic workers who hoped to find a place in the labour pool of the carers and who hoped to find the public services of the State as their opponent instead of private household contractors have felt the blow. Various different sources indicate that only one quarter of those who applied for it have begun to receive support three years after the law was approved. The average amount of support for family members is some € 300 per month¹²⁹. The majority of applications for care of dependents have been resolved by means of a subsidy to the family members who take charge of the care of the dependent relative (this route was initially reserved for temporary or special situations). The solution is much cheaper for the public treasury than if it had had to pay the minimum wage or the average wage of domestic workers, and much

¹²⁹ According to the Report by (Fundación CASER “*Help for dependence in Spain. The current situation (Ayudas a la dependencia en España. Situación actual*”) 2009), the average support received in Andalusia was € 300, and in Guipúzcoa it was € 316.

cheaper than if it had had to pay qualified, professional, and unionised workers¹³⁰. Paid workers have the opportunity of joining associations, and of “taking the struggle into the street” as is frequently said in the language of union demands, while family carers are unable to do so because they are hostage to their moral responsibilities and cannot leave their work even though the conditions under which they work (privacy, rest, comfort, safety) would be unacceptable for any paid worker.

This opens up a new field of negotiation and potential conflict, in which paid workers who take care of dependents take part in addition to the family members who take on their care without receiving any type of subsidy for doing so, or a subsidy so modest that it guarantees the carer’s own economic dependence on other family members or their direct condemnation to poverty.

The majority of carers are grateful for the subsidy because they would have done the same even without receiving it, because they have no alternative; but the law has contributed to making the harshness of the standard of living of non-remunerated domestic workers in comparison with all other workers more visible. There is no proportionality between what many family carers have had to do (availability 24 hours a day for 365 days every year) and what is considered legitimate for the paid workers who share a part of the work with them.

As a result of the cited debates in October and November 2009 in Madrid, an extensive series of proposals was prepared, which are very heterogeneous in their degree of generality and feasibility and may be summarised in the following points¹³¹:

- 1) *On a general level, in order to facilitate the reconciliation between work and care:*
 - 1a) *Provision of public funding by the State, such as free schools*

¹³⁰ In fact, in colloquial language, the family representatives of dependents present during the working day referred to it colloquially by the nickname of “la paguita”.

¹³¹ After the conferences and the drafting of this text, the proposals detailed here were published in a “Set of Proposals” coordinated by INSTRAW, under the title of “*A Just Place for household work and workers - Un lugar justo para el empleo de hogar y sus trabajadores*”. It is a more technical and formal document especially in the legal aspects, although in the substantive aspects no changes have been made.

and kindergartens, canteens, homes for the elderly, day centres, etc.

- 1b) *Reduction in the working day* for workers in all sectors, in order to facilitate the reconciliation between work and care.
- 2) *Specifically for domestic workers:*
 - 2a) *Regularisation* for all domestic workers without residence documents.
 - 2b) *Equating* the Special Regime for Domestic Workers with the General Regime of the Social Security.
 - 2c) *Creation of public intermediation mechanisms* and the elimination of private companies, placement agencies and intermediation bodies.
 - 2d) *Unionisation* and implementation of platforms and associations of representatives of domestic workers.
 - 2e) *Petition for an increase in the number of formal complaints* against employers in cases where they do not comply with the law, even in cases involving workers in illegal circumstances.
- 3) *Changes proposed in the application of the Dependence Law:*
 - 3a) *Creation and centralisation of public services* provided free of charge by the State.
 - 3b) *Formal complaint against the application of Article 18* which according to the proposal is contributing to leaving the responsibility of care in the hand of the women of the dependent's family.
 - 3c) *Extension of the rights of persons with functional diversity* to the development of all aspects of their life.
 - 3d) *Delimitation and professionalisation of the tasks of caring* for dependents, in accordance with the requirements of care and not with the budgetary situation or with other interests.
- 4) *Specific action and establishment of agenda.* The commission proposed to set up an inter-ministerial round table with support from the Ministry of Labour and Immigration, the Ministry of Health and Social Policy, the Ministry of Equality, the unions and the State Platform for Domestic Workers in order to negotiate the proposals and satisfy the recommendations of the ILO.

Some of these proposals have the appearance of feasibility, such as the equivalence between the Special Domestic Workers Regime and the General Regime of the Social Security because in Spain it coincides with the tendency to homogenise the different administrative statuses into one unified regime for all workers. The realisation of other proposals would entail an immediate increase in the labour cost, both in the part for which the workers themselves are liable and in the part which corresponds to the employer; but the greatest bottleneck for the acceptance of this point would not lie with the minority of full-time workers, but in the majority, which works part days or days split between different households.

The proposal for mass regularisation does not appear to be feasible. Point 3d, in which there is a request for the needs of care to be given priority regardless of the budget situation or other interests, is attractive but tremendously naive. However prosaic they may be, proposals cannot be processed without a prior analysis of cost and of disposable resources.

Under any circumstances, the document of proposals prepared in Madrid does not lay any emphasis on direct payment. Their promoters were conscious that they would contribute to the reduction of employment and an increase in clandestine work, and that is why the emphasis was turned on the duties which the State would have to assume in Spain in questions of landed status, regularisation, bringing families together, maternity, and other forms of social protection for domestic employees, of which the most important in financial terms is unemployment protection. It does not insist upon the possibility of setting up other systems such as the system in France of payment by cheque, which has generated a whole new structure for cooperation between private individuals/banks/the State and workers in care services¹³².

¹³² The "cheque system" makes it possible for the employer to make a tax deduction, add up the cheques of several employees and have them issued by the companies in a manner similar to restaurant luncheon vouchers, as a form of deferred wage complement. The purpose of this system is to bring hidden labour to the surface and to improve the social protection of the workers. It involves management expenses and the payment to the Social Security, and therefore reduces the net amounts which would be received in the event it were a job on the hidden market.

7.6. The viewpoint of the labour market

7.6.1. The entry point to the labour market through a volatile sector

Remunerated work in households occupies a low position in the occupational scale, both because of the real wages and because of access to social benefits and social prestige. Since this is a branch of activity which is less regulated than the remainder, it is the principal point of entry into the labour market for immigrant women and for a large part of low-qualified Spanish wage earners who work on a part time basis. This is also the starting point for those who formerly had other better occupations, but lost their jobs and seek a last foothold in this activity.

The experts in this sector of the labour market frequently repeat the saying that “Not everybody who is there is actually there, and nor are those who are meant to be there is actually there”. In this way they sum up the idea that the sector is to a large extent a fiction of the Public Administration, because there are many people who are in fact workers who are not recognised as domestic workers in the surveys, and nor are they registered with the Social Security or pay contributions. Although not so numerous, cases of workers are also frequent who apparently form part of the sector, and this is what they declare, or they appear in a range of different public authority registers but however they are not in fact. There are various different sources for the analysis of remunerated domestic work although they respond to different proposals and methodologies which make it difficult to compare results.

The Ministry of Labour and Immigration publishes the data from the “Registered Labour Movement”. These are registrations with the Social Security and specify what type of regime the workers belong to. This source allows a more accurate monitoring of the structure of the labour market and changes in the age, nationality and gender of those registered with the General Regime, and the Special Regime for Domestic Workers (Table 7.2). Nevertheless, as a result of the high frequency of part time employment, the inviolability of households, and other legal and social conditions, registration in the domestic workers’ sector is not such a valuable indicator of belonging or not belonging to the sector, as it is for

TABLE 7.2: Workers registered with the Social Security under the Special Regime for Domestic Workers
(average in thousands)

Year	Total registered*			Special Regime for Domestic Workers				
	Total	Men	Women	Total	Percentage of total registered*	Men	Percentage of total	Women
1997	12,932.1	8,281.1	4,573.9	142.6	1.10	8.4	0.10	133.9
1998	13,591.0	8,660.9	4,863.5	142.2	1.05	8.4	0.10	133.5
1999	14,344.9	9,066.0	5,221.9	149.0	1.04	9.7	0.11	139.0
2000	15,062.9	9,409.6	5,604.8	151.1	1.00	8.9	0.09	141.9
2001	15,649.9	9,669.6	5,940.3	155.9	1.00	8.1	0.08	147.5
2002	16,126.3	9,873.0	6,225.1	176.0	1.09	9.4	0.10	166.3
2003	16,613.6	10,088.4	6,524.2	184.6	1.11	9.6	0.10	174.9
2004	17,081.8	10,276.9	6,804.1	181.0	1.06	8.7	0.08	172.2
2005	17,835.4	10,606.1	7,228.7	284.7	1.60	20.2	0.19	264.4
2006	18,596.3	10,955.1	7,640.9	335.6	1.80	26.0	0.24	309.6
2007	19,152.3	11,178.4	7,973.7	275.5	1.44	17.0	0.15	258.5
2008	19,005.6	10,884.2	8,121.2	280.0	1.47	18.3	0.17	261.6

* Those registered under the Special Regime are also included in the total registered.

Source: Prepared by M. A. Durán using data of the Ministry of Labour and Immigration "Registered Labour Movement". Workers registered as being in employment (INE 2009).

workers who are registered to the General Regime or to other special regimes.

In Spain, registering with the Social Security is a right and a duty on workers and employers. Registering with the Social Security is mandatory, which means that in theory a worker registers with the organisation when their working life begins. Such registration is known as *initial registration*. If they cease to be employed, they will continue to be registered but as *not in employment*. If they start working again, there will be a *successive registration* which is different from the initial registration which only takes place once. When worker ceases any job or service, the company is obliged to notify the Social Security that they have been deregistered from the company. Statistics on registered workers refer to those who are in employment or in similar situations (temporary disability, suspension arising from redundancy, and partial unemployment). They do not include unemployment or similar situations. Any worker can be counted as registered several times if they carry out various different activities which entail contributions to the Social Security.

The high cost means that in some types of work registration figures are low in comparison with the real number of workers because the employers and often the employees as well, see it as a tax on work and attempt to evade it. This situation is more frequent among the self-employed, discontinuous workers, part time workers, and/or low income workers, particularly if the immediate health benefits which registration bring can be obtained free of charge by other routes. In addition to its financial dimension, registration with the Social Security is legal proof of the existence of any employment activity, and it is therefore avoided by employers and employees who do not wish to acknowledge it, for various different reasons. Nevertheless, specifically because of its public nature, registration may be used as a means of demonstrating residence and belonging to the production structure of Spanish society.

The proportion of part time workers and those with discontinuous employment histories is very high in domestic work. Domestic work acts as a door for entry to and exit from the employment market, especially for immigrant workers. The proportion of registrations is low in comparison with the number of workers who are identified in the LFS as belonging to this sector.

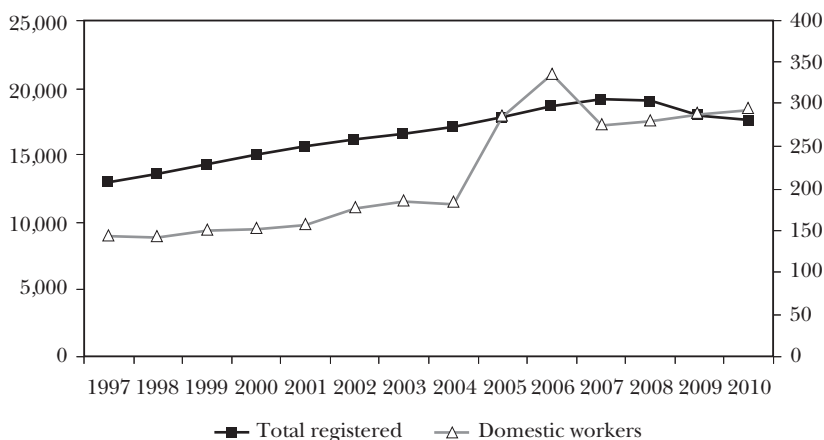
As a whole, the domestic work sector is more volatile than other sectors and is more sensitive to external influences of a legal nature, which produce large oscillations in its volume and composition. In other words, the flow is more important in comparison with the stock than in other sectors. The percentage of domestic workers who have been in their job for less than six months (16%) is almost twice as much as for all workers as a whole (9%). 24% have been working in the same job for more than six years, which is not quite half the proportion for all employed workers (50%) (LFS 1st Quarter 2011).

Immigrants play an important role in these changes in domestic employment. While there were 44,841 foreign workers registered with the Social Security under the domestic workers regime in 1999, in the year 2006 there were 223,131, and one year later this had fallen to 160,063. In a period of nine years it grew by 115,222 persons, and in percentage terms it grew by 257%.

In this sector a nucleus of stable workers lives side by side with another very unstable core, which is more of a passing current or a temporary refuge than a group which genuinely belongs in the sector. The number of Spanish workers registered under this regime has remained virtually stable at around 100,000 workers during this period, with a growth of only 10%, while the number of foreign workers grew by 28%. The sector has become internationalised at a tremendous speed. In the year 1999, foreign workers only made up 30% of those registered under the Special Regime for Domestic Workers; in the year 2007 they made up 58% of those registered under this regime.

Nevertheless, although immigrants are a majority out of those registered with the Social Security under the Special Regime for Domestic Workers (and in an even greater proportion of those not registered), the proportion of immigrants who contribute as domestic employees has not increased as a proportion of all registered immigrants. This special regime received 1% of all registrations of workers in 1999, and 13.4% of registrations of foreign workers. In the year 2007, it received 1.4% of all registrations, but only 9.6% of all registrations of foreign workers. In the year 2011, it received 1.7% of all registrations.

As can be seen in Graph 7.1, the number of domestic employees registered to the Social Security fell slightly between 1997 and 1998.

GRAPH 7.1: Workers registered as being in employment*

* *Total registered* are represented by the scale on the left-hand side, and *household employees* on the scale on the right hand side.

Source: Prepared by M. A. Durán using data from the Ministry of Labour and Immigration "Registered Labour Movement". Workers registered as being in employment (INE 2011).

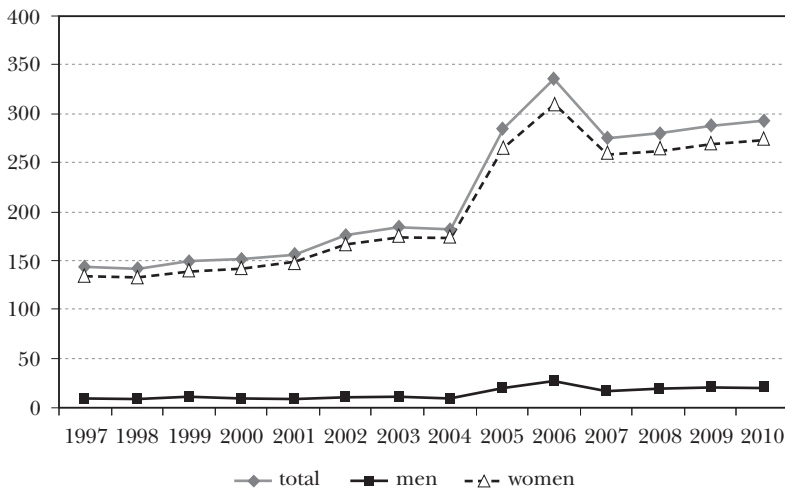
In 1999, it increased and continued to do so slowly until the year 2004. In the year 2005, as a result of the regularisation of illegal immigrants (700,000 regularisations) there was a spectacular leap of 57%, and the sector grew by 103,000 registered persons. This brusque increase occurred once again, although more moderately, in 2006 (an increase of 55,000 persons, 18% more than in the preceding year), and then fell in 2007 by 60,000 personas. In the decade from 1998 to 2007, employment in the domestic workers and cleaning sector achieved a growth of over 100%, while the number of all registered workers only grew by 41%. During this period of 1997-2007, the number of foreign domestic workers grew by 398%. Since then it has been relatively stable, at slightly below 300,000 registered workers (296,000 in April 2011).

Such sustained growth has been due in part to the increase in demand (financial boom, increase in women employed at medium and high levels, increased population of the elderly), but above all the expansion is due to the supply offered by immigrant workers, and the consequent cheapening of wages in the sector.

As has already been indicated, domestic employment in households is an unregulated sector in which numerous circumstances of

the hidden economy are to be found. It is a sector which is very sensitive to changes in the legislation, such as the requirements for entry into the country or the conditions for obtaining a residence and work permit for immigrants. The incidence of registrations of workers who join the labour market for the first time, known as *initial registrations*, were between six and ten times more frequent in the Special Regime for Domestic Workers (Graph 7.2) than that of workers under the General Regime over the period 2007-2010 (0.90% as against 5.2% as a proportion of all registrations in 2010). Under the Domestic Workers Regime, changes of employer count as registrations and de-registrations, as well as changes between employment and unemployment¹³³.

GRAPH 7.2: Workers registered under the Special Regime for Domestic Workers
(in thousands)



Source: Prepared by M. A. Durán using data of the Ministry of Labour and Immigration "Registered Labour Movement". Workers registered as being in employment (INE 2009).

¹³³ The *registrations* could be seen as a stock (registered workers) or as a flow (initial and successive acts of registration). They are similar, but not identical, to employment contracts. Some workers accumulate a great number of registrations because they perform discontinuous jobs (for example, temporary waiters for banquets, film dubbers, etc.). In 2011 there were only 17,111,800 (Employment Statistics Bulletin, Ministry of Labour, 10 January 2012).

7.6.2. High volume of employment, part time working, undeclared employment, and low contributions to the Social Security

In the case of all workers, the disparity between the figures for registration with the Social Security and for those employed according to the LFS is not very great, but it is enormous in the case of those registered as domestic workers, and it has been the same for recent decades¹³⁴. To a large extent it is a problem of definition, because in spite of being a very numerous group, domestic workers are not identifiable as an occupation in the INE data on the LFS, but as workers in a branch of activity in the category of “activities in households as employers of domestic staff and as producers of goods and services for internal use”. Since the domestic workers are aggregated with producers of goods and services for internal consumption, the figures are higher and lead to confusion (Table 7.3). According to the LFS, there were 724,000 employees in 2009 who defined themselves as domestic employees, a figure which is two and a half times greater than the figure for those registered under the Special Regime for Domestic Workers. In 2011 (1st Quarter) there were 703,000. The LFS also provides information about workers who work inside another family household, but the data are not published by the INE. Domestic employees make up 4.6% of all wage earners, and 3.8% of all those in employment. In the case of women, 9.1% and 7.9%, respectively¹³⁵.

The LFS is not the only source which provides regular information about domestic employees, and the CIS Barometer surveys also do so. The Barometer for October 2009 found that the proportion of “reference persons” who worked in domestic service was 2.5%. If this is applied to the number of households determined by the LFS for the 4th Quarter 2009 (17,121,400 households) it is equivalent to 428,035 “reference persons”¹³⁶, to which workers who are not the

¹³⁴ Based upon publications by the Institute for Women, the Living Conditions Survey 1986, and the Report on Family and Domestic Inequality by the CIS, it is estimated that there were 578,000 people in employment in domestic service in 1987, of whom half did not make Social Security contributions (Durán 1988, 150).

¹³⁵ As in employment in household activities with domestic staff employers and as producers of goods and services for own use (3rd Quarter 2009).

¹³⁶ The CIS defines the *reference person* as the person who contributes the most income to the household.

TABLE 7.3: Persons occupied in households employing domestic workers and producers of goods and services for own use (LFS) and those registered under the Special Regime for Domestic Workers

	2006	2007	2008	2009*
No. in employment 1 st Quarter*	749.4	764.5	750.8	711.6
Annual average	760.6	777.0	752.6	
No. registered under Special Regime for Domestic Workers**	335.6	275.5	280.0	287.8
Percentage of those registered over those in employment	44.8	36.0	37.3	40.4

Source: * INE, Working Population Survey. In the 3rd Quarter of 2009, the figure of 724,100 in employment out of a working population of 816,900. ** Ministry of Labour and Immigration, Labour Statistics Bulletin. Registration of workers in the Social Security system.

principal provider of income to their own household have to be added. In January 2011, another Barometer estimated that 1.3% of wage earners worked in domestic service, so 1.5% of all workers work for households which employ domestic staff.

Another source of information is that provided by the Time Use Survey 2002-2003. From this it can be concluded that there are 1,648,351 households (11.6% of the total) which employ domestic staff, and they employ 1,715,863 workers in service (Casero and Angulo 2003, 41: 44)¹³⁷. In reality the total number of workers is lower, because many of them work in several households simultaneously. According to this same source, the average number of hours worked per week per employee was 10 hours. According to Angulo and Casero, this is equivalent to 431,229 full time jobs¹³⁸.

Employers are not required to register employees who work for less than twenty hours per week in their household, and the majority of employees are not prepared to register either if they have to

¹³⁷ There were 14,187,443 households in the year 2003, according to the Family Budget Survey.

¹³⁸ According to another source of the CIS, the Barometer for March 2010, there are 2% of households in which one or more unrelated persons live together. Domestic workers are included here, together with other categories (friends, tenants, etc.).

pay their own contributions. It is not only, and not even principally, a question of the amount of money received. What is really in play is the fear of workers in an irregular situation that the public authorities will find out, the desire to avoid taxation on the part of those who do not make a return for their income in the informal market, and in many cases hiding real income in order to improve the opportunity to gain access to public benefits which are reserved for groups in a precarious situation (kindergarten, scholarships, accommodation aid, etc.). The situation is very different for full time workers on an exclusive basis, with a history of continuity, from the case of part time workers, divided between several different households and without any expectations of continuity. The first type of employee generally has no Social Security cover through their own family, and their aspiration is to achieve it as an individual. The second type of worker frequently enjoys cover through the family or some other type of private insurance and they do not consider it to be an advantage to pay the Social Security contribution because it is a cost which has an impact upon their own income. For the same reason it is very common to reject intermediary companies, which have to deduct the cost of Social Security and other taxes from the payment to their employees, in addition to the commission for their administration.

If access to the public services (health, education, non-contributory pensions, etc.) is not tied to registration and payment to the Social Security, domestic employees frequently consider this to be an avoidable cost, regardless of whether the impact is indirect through the wage which is paid to them by their employers or it has to be paid directly.

As an average of all workers registered with the Social Security, the women are two years younger than the men: 38 and 40 years old, respectively. Nevertheless, under the Special Regime for Domestic Workers, the women are older than the men, with an average age of 43 years old for women and 39 years old for men. As the proportion of men in the sector is very low, the characteristics of the whole group are very close to the characteristics for the women. Women registered under the Special Regime for Domestic Workers are on average five years older than the average of all women registered with the Social Security. It is a registration/refuge for workers who

do not consider it probable that they can change to another type of occupation.

7.6.3. Type of working hours and overtime hours, according to the LFS

In other sectors, the volume of work can be estimated fairly closely by means of the number of workers, but work for households requires a more detailed approach. As we have indicated, the proportion between occupation and effective work in the reference week is higher for domestic workers than for the remainder, because holidays and leave have less impact. Unemployment is also lower than for the whole working population. Nevertheless, working hours are higher in the labour market as a whole, where only 12.3% of workers are part time (LFS, 3rd Quarter 2009). In this respect, men who work as employees in households have similar working hours to those in the market as a whole, while women, who make up the immense majority in the sector, above all work part time (50.2%) (Table 7.4).

In the international literature about domestic work, it is common to see complaints about situations in which workers endure very long working days which are prohibited by labour laws. In Spain, working conditions are governed by the Special Regime for Domestic Workers, which determines the maximum number of working hours, vacations, public holidays, and minimum rest time between working days. There are some small differences between

TABLE 7.4: **Workers in employment by type of working hours and gender** (percentage)

	Total in employment		Domestic workers	
	Full-time	Part-time	Full-time	Part-time
Total	87.7	12.3	53.4	46.6
Men	95.3	4.7	87.5	12.5
Women	78.0	22.0	49.8	50.2

Source: Prepared by M.A. Durán using data from the Working Population Survey, 3rd Quarter of 2009 (INE 2009).

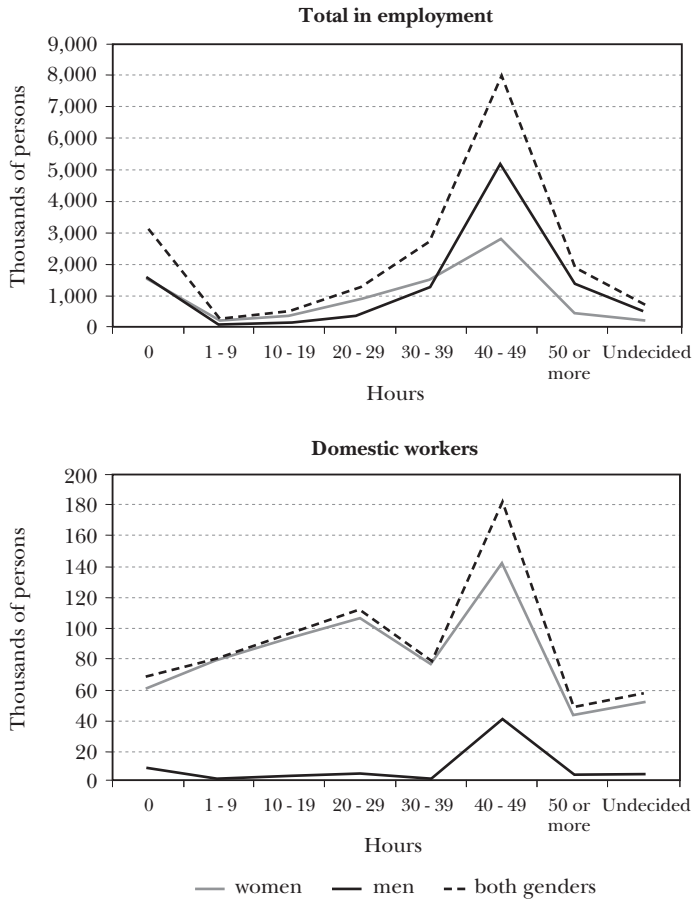
the General Regime and the Special Regime, which will probably be eliminated in the near future, but there is one very important difference, inherent in the work which is performed in households, which will be difficult to resolve with legal measures. This is the question of providing company or being present, a category which has some points in common with “availability”, which is also required or senior management in many organisations. Being present does not affect workers whose home is different from that of the employer very much, but it is an essential part of the agreement when the workers live in the same household as that for which they work, and it is on occasions specifically the necessary principal condition for obtaining the job.

The Special Regime stipulates that part of the wages may be paid in kind, and accommodation and board are payments in kind which could be the equivalent of up to 45% of the wage until the year 2011; from that year on, only 30%. The duration of the weekly working hours is forty hours of actual work, which does not include “time present”. Union organisations have made a large number of proposals for the limit to be forty hours, and the time present is calculated within those forty hours, both for workers who sleep in the household and for external workers.

For all workers as a whole and for domestic workers, the most frequent working hours comprise 40 to 49 hours per week. Although 43% of all workers have this type of working hours, it is 25% of domestic employees, and 15% have working hours of 20 to 29 hours per week, which only happens with 7% of all workers as a whole. The average number of working hours for those working in their principal employment is 25.5 hours for domestic workers (33.0 hours for men and 24.7 hours for women), and 31.9 hours for all workers as a whole (34.9 hours for men and 28.1 hours for women). The percentage of domestic employees who say that they effectively worked for 50 hours or more was 6%; among the total working population, the figure is 10% (LFS of 3rd Quarter 2009) (Graph 7.3).

According to the LFS, 96.8% of wage earners and 98.4% of domestic workers did no overtime during the week prior to the survey. The overtime hours reflected in the LFS are virtually equal between domestic employees and all workers as a whole. Whatever the case,

GRAPH 7.3: Workers in employment by number of effective working hours in the principal employment during the week, by gender, and by branch of activity
(in thousands)



* The average number of effective working hours for those in paid employment in the private sector is 25.5 (33.0 hours for men, and 24.7 hours for women).

Source: Prepared by M.A. Durán using data from the Working Population Survey, 3rd Quarter of 2009 (INE 2009).

extreme situations which are very much in the minority are not visible to the statistics, and therefore it is impossible to rule out the possibility that there may exist circumstances of abuse, or that the LFS is a rather unsuitable instrument to detect this.

7.6.4. Effect of the lack of unemployment cover on domestic workers

The work which is performed in households is affected by the situation of the employment market, both for remunerated work and for non-remunerated work. When the employment market is capable of absorbing workers, part of the work carried out without remuneration in the household is transferred away from the home, to other jobs. The most qualified women go on to occupy jobs away from the home, and are partially replaced in the household by paid workers who take charge of the jobs which require the least qualifications, particularly in the fields of cleaning and providing company. When the employment market pushes workers out, and consequently the incomes of households fall, one part of the paid workers who were carrying out domestic tasks also lose their jobs or reduce their working hours. However, in parallel, in households whose incomes have fallen below subsistence level, the members of the household who did not formerly have employment attempt to join the labour market. For women who have difficulty in gaining access to other employment, paid work in households is in many cases the sole alternative possible.

The domestic work sector is not regulated very much, or, to explain it more correctly, to a large extent it exists as a result of deregulation. For this reason it is very difficult to estimate the impact of unemployment on this sector. Many workers do not feel as if they are “part” of the sector, and they only see themselves as forming a temporary part of it while they are waiting to move on to a better job.

Since this is a regime which does not give unemployment cover, the number of workers who may have availed themselves of the right cannot be evidenced. Nor is it possible to know with accuracy how many workers of those who in fact work in the sector are in reality unemployed workers coming from other sectors, without or with cover. According to the LFS, in the second quarter of 2010, unemployment among the whole working population was 4,645,600 persons and among the population working in domestic work and producers of goods and services for self consumption there were 103,500 unemployed, which in turn gives unemployment indices of 20.1% and 12.0%. Nevertheless, the data published for the LFS does

not make it possible to delimit the categories of domestic workers and produces for own use.

One of the few indicators which provides information about unemployment in domestic work is the statistics on the *Registered Labour movement*; which is carried out by the Ministry of Labour and Immigration, and is published by the INE.

According to the register of demands for employment at the Ministry of Labour, between 2005 and 2007, the pending demand for employment for all workers is almost stable: it moved from 3,036,900 applications to 3,018,100, which represents a slight fall of 0.6%. The high proportion of women among applicants bears witness to the greater difficulty experienced by women in finding work, and their relatively greater use of institutional channels (60.7% in 2005, 61.0% in 2007) which is higher than among the entire working population in employment.

During the same period of 2005-2007, pending applications for employment in respect of domestic workers and cleaning staff within buildings grew by 6%, going from 321 thousand applications to 341.4 thousand. The proportion of growth was equal in the case of men and women. Nevertheless, unlike the aggregated demand for all occupations, in which there are 61% of women, out of all applicants whose occupation is domestic employment, the proportion of women is 95% of all applicants.

Applications for employment pending resolution in respect of workers who define themselves as domestic workers or cleaners of buildings are proportionately higher than in other sectors. Either they do not find satisfaction or those who do are replaced by new applicants.

7.6.5. Wages: contribution bases and market prices

Under Spanish legislation, the wages of full time employees may not be less than the minimum wage. However, the minimum wage does not apply to the non-working activities or to the “time present” recognised by the Special Regime for Domestic Employees. Although the market wage is currently higher than the minimum in the majority of local labour markets, the inclusion of periods of “time present” may deprive the minimum wage of any meaning. In the year 2009, the minimum wage (*salario mínimo interprofesional*)

- SMI) was € 570.6 per month, € 20.80 per day, giving an increase of 5.5% with respect to the preceding year. The minimum base for contribution to the Social Security for unskilled workers was € 24.27 per day. For part time employment contracts, the minimum basis for contribution to the Social Security was € 4.39 per hour for groups at levels 4 to 11 on the job scale (the lowest levels).

The contribution base for the Social Security in the case of domestic workers was set by law at € 728.10 per month for the year 2009. There are very few workers who receive the minimum wage, and the average wage for domestic employees is no lower than the market wage, although there are great differences, depending on the local market and the conditions set by the authorities and the qualifications of each employee. Classified advertisements, especially in the magazine *Segunda Mano*, which is distributed free of charge on the internet, are an excellent complement to statistical information, and are very agile, although in reality some are only there for the purpose of acting as a hook to locate potential employers and employees. They contribute to creating opinion and trends, although, evidently, fraudulent working conditions or the acceptance of people in an irregular legal position are not advertised in these pages.

The advertisements transcribed in Table 7.5 comprise a small selection of those published in the Madrid magazine *Segunda Mano*, on two consecutive days in the month of November 2009. The advertisements which gave explicit financial conditions have been prioritised; these are frequently mentioned by employers, but not by the workers. They come from the section of “Jobs”, in the subsection “cleaning and carers”. There are subtle variations in the terminology which reveal aspects which are difficult to detect in other texts, such as legal or financial texts.

These classified advertisements, which reach many potential employers and employees because of their low cost, show first of all that employees who work by the hour do not use them, but use other channels. Secondly, none of the advertisements expressly mention the daily working hours, although they do specify the free days per week or how long the annual holidays are. The wages which are mentioned explicitly are above the level of the contribution base of the Social Security, and above the minimum wage. If it is assumed that accommodation and maintenance are included, as is normal

TABLE 7.5: **Working conditions for domestic work, from job advertisements in the press**

Advertisement no. 1	Jobs offered. “Live-in, between 25 and 45 years old, for domestic work, has colleague. General Regime. Euros 1,000, plus 13th month payments, plus vacations. Two days off per week. Required to speak Spanish properly, to be dynamic, cultured, with work permit and references”.
Advertisement no. 2	Job wanted. “Spanish lady, 37 years old, experience, driving licence and own car, for children, elderly persons, domestic work”.
Advertisement no. 3	Job wanted. “Paraguayan male, serious, experience as welder, seeks job in cleaning, etc. Three years’ residence in Spain, responsible and serious”.
Advertisement no. 4	Jobs offered. “I need live-in, Madrid, € 750 per month, Social Security, two half payments of 13th month. To take care of two babies, two days off mid-week (will work week-ends), experience indispensable”.
Advertisement no. 5	Jobs offered. “Live-in, two children, € 825 per month, Social Security, holidays, 13th month, week-ends free”.
Advertisement no. 6	Jobs offered. “Live-in with papers, preferably Ukrainian, three children”.
Advertisement no. 7	Jobs offered. “Live-in, for Madrid, € 900 plus Social Security, half 13th month, vacations”.
Advertisement no. 8	Jobs offered. “Live-in, Philippine, good English, for children, € 800 per month plus Social Security, plus one month’s holiday, and two half payments of 13th month”.

practice for employees who live in the household where they work, a further sum of a maximum of € 327 per month as payment in kind has to be added to the wage offered (45% of the contribution base wage), as the legislation of the time permitted, and € 133 for the part which the employer is required to pay to the Social Security, together with the proportional part of the holiday pay, the 13th month, and some other minor costs which are not included in the wage (use of telephone, etc.). If these indirect costs are to be taken into account, the real wages corresponding to these advertisements would exceed € 1,500 in the case of the lowest and € 1,750 in the case of highest. Since 2011, only 30% may be deducted from the

wage as payment in kind, although this does not mean that at market prices the accommodation or the maintenance may have a cost higher than this level for the employer.

The third feature worthy of note is the internationalisation of this segment of the labour market. It is much more visible in the jobs wanted than in the jobs offered, although in this text they have hardly been indicated because the wage expected is rarely shown. The majority of those looking for domestic employment come from Latin America or from Central Europe. Those offering employment do not usually specify nationality or ethnicity, but they do mention the condition of being in good legal standing with the authorities, a good knowledge of Spanish, and experience. Even so, a preference for some nationality is made explicit fairly frequently, such as in advertisement no. 6 (“preferably Ukrainian”) and in no. 8 (“from the Philippines, English”). Finally, advertisement no. 3 illustrates an example of men being employed in the domestic sector, which is not frequent but equally not unheard of. The applicant is coming from a sector in crisis (construction), and has experience as a qualified worker (ferrous metals welder) but is prepared to look for work in a sector which is traditionally more undervalued. He is not applying directly for a domestic job, but “cleaning”, and he is therefore preferably addressing service companies, but he leaves the door open to other opportunities by including the word “etcetera”. In his concise message he nevertheless considers it necessary to underline on two occasions, at the beginning and at the end, his personal qualities of seriousness and responsibility in his work.

None of the offers included in this selection specifies that the worker will have to take care of elderly people, and therefore it could be interpreted that these are jobs for substituting young women with small children who have joined the job market in their household tasks. Nevertheless, the care of the elderly is the principal occupation of many domestic workers. In a number of the advertisements a relatively qualified profile is required or offered: “cultured, dynamic”, “with driving licence and own car”, “good English”, which point towards a type of work which is more orientated towards direct personal contact with members of the households than towards the basic tasks of cleaning and maintenance, which are what are taken on principally by domestic workers on a part-time and discontinuous basis.

7.6.6. Internationalisation and occupational mobility in remunerated work in households

Between 1999 and 2007, the share of the Spanish labour market held by foreign workers intensified, and went from 334,976 workers registered with the Social Security as being in employment, to 1,957,578. In percentage terms, the growth was 584%. Foreign workers registered as being in employment under the Special Regime for Domestic Workers also grew considerably between 1999 and 2006, increasing from 44,841 to 223,131 registered, but proportionately not so much as foreign workers registered in the market as a whole. The relative weight of domestic workers out of all foreign workers registered fell from 13.4% in 1999 to 10.1% in 2007. Although it is possible that the registration rates in the domestic worker sector may have fallen without the real number of workers decreasing, the most probable explanation is that once the threshold for entry into the labour market had been reached, both in official and in real terms, many workers found jobs in other occupations.

In March 2009, there were 177,017 foreign workers registered with the Social Security as being in employment in household activities, as domestic staff¹³⁹. Of those, 134,983 were working as employees (76%) while 42,034 were self-employed (24%). This figure confirms the relative volatility of the sector, because the foreign workers registered in the year 2009 were 20% lower than the registrations for three years earlier, and fell back below the levels of the year 2005. Slight increases and decreases occurred during the year 2009; by November there had been an increase of 3,000 people (1.5%) in comparison with January of the same year¹⁴⁰.

The number of Spanish workers registered in this sector has not seen great change over the past decade (104,000 in 1999; 112,000 in 2006; 115,000 in 2007), but their relative weight has fallen. While they made up 70% of those registered in this sector in 1999, they fell to 33% with the great boom in immigration and regularisation in 2006, and after this wave passed, they increased to 42% in 2007.

¹³⁹ Labour Statistics Bulletin published by the Ministry of Labour and Immigration, March 2009.

¹⁴⁰ In the update to the statistics on "Foreign workers registered with the Social Security and in employment" (26 November 2009) this figure falls to 173,338 by March 2009 and 173,963 by October 2009.

Only 26% of domestic workers have been more than six years in the same job, which is almost half the figure for those in employment as a whole (3rd Quarter 2009). Although employment is not exactly the same as activity, and nor does domestic worker coincide exactly with employment in households, this is an indicator of high occupational mobility, however much the conceptual differences make it necessary not to take the figures literally (Table 7.6). The analysis in the Immigrant Survey leads to the conclusion that of

TABLE 7.6: Occupational mobility of immigrants employed in household activities
(percentage)

	Currently working in households and started working in:		Started working in households and currently working in:	
	<i>N</i>	Percentage	<i>N</i>	Percentage
Total	213,720	100.00	338,811	100.00
Agriculture	4,938	2.31	3,612	1.07
Fisheries	0	0.00	0	0.00
Extractive industries	0	0.00	0	0.00
Manufacturing industries	7,200	3.37	12,405	3.66
Energy	0	0.00	575	0.17
Construction	4,076	1.91	2,709	0.80
Shops	3,168	1.48	31,083	9.17
Hotels and restaurants	8,975	4.20	51,194	15.11
Transport	304	0.14	5,357	1.58
Financial intermediation	0	0.00	863	0.25
Real estate activities	3,355	1.57	24,484	7.23
Public Administration. Defence	102	0.05	1,246	0.37
Education	44	0.02	1,981	0.58
Health activities	2,486	1.16	14,271	4.21
Community and personal services	1,957	0.92	10,873	3.21
Household activities	177,115	82.87	177,115	52.28
Extraterritorial organisations	0	0.00	114	0.03
Doesn't know	0	0.00	931	0.27

Source: Prepared by M.A. Durán using data from the National Immigrant Survey (INE 2007).

those currently working in households, 83% started in the same activity, but not much more than half (52%) of those who entered the labour market by this route continue in the same activity a few years later. This is an activity which serves as a stepping stone for receiving immigrants (338,811 immigrants entered this way) and they leave subsequently in order to find work in other activities. 125,091 workers have left the sector: to the hospitality industry (51,194 workers, 15% of transfers), retail (31,083 workers, 9% of transfers), real estate business (7%), health services (4%), manufacturing industry (4%), and community or personal services (3%).

On the assumption that the immigrants who entered the labour market with a job in households have been in Spain for an average of five years, it could be estimated that each year 25,000 workers have transferred to other sectors, and that their jobs have been covered in the main by immigrants who arrived subsequently (Table 7.7).

In addition to becoming female, foreign, part-time, and relatively discontinuous, domestic employment has a distinctive distribution by age, with a relatively high proportion of workers of mature age, although in recent years it has rejuvenated slightly because of immigration. The five characteristics indicated define a type of work which owes its existence to a large extent to its unregulated nature and its low social prestige.

7.6.7. Jobs wanted in order to change sector as a sign of discontent

For workers who work a full time day, who are the majority in all sectors overall, presence at the workplace allows of few intermediate situations: either they are working or they are not working. Nevertheless, domestic workers are not protected against unemployment, and therefore they cannot just “stop working” without causing themselves considerable harm. Nor do they usually enjoy benefits such as temporary leave, study leave, or leave for family reasons. Many workers have limited opportunity for holidays. Additionally, precisely because the majority work on a part time basis in their principal job and many work simultaneously in various different households, more flexible working combinations are possible as are intermediate situations between the “all or nothing” which is typical of working conditions for other workers.

TABLE 7.7: In employment by time in the job, by gender
(percentage)

	Total in employment				Domestic workers			
	Total	%	Men	%	Women	%	Men	%
Total	18,870.0	100.0	10,613.3	100.0	8,256.3	100.0	68.6	100.0
A Less than 3 months	1,217.6	6.5	641.7	6.0	575.9	7.0	9.7	14.1
B From 3 to 5 months	732.6	3.9	401.3	3.8	331.9	4.0	4.0	5.8
C From 6 to 11 months	1,089.4	5.8	550.3	5.2	539.1	6.5	3.8	5.5
D From 1 to less than 2 years	1,882.5	10.0	926.7	8.7	955.9	11.6	6.1	8.9
E From 2 to less than 3 years	1,501.2	8.0	743.3	7.0	757.9	9.2	3.0	4.4
F From 3 to less than 6 years	3,200.1	17.0	1,711.3	16.1	1,488.8	18.0	5.6	8.2
G 6 years or more	9,246.7	49.0	5,638.7	53.1	3,608.0	43.7	36.4	53.1
Average time	49.5		51.4		47.0		46.7	

Scale employed: A=3; B=4; C=8.5; D=18; E=30; F=54; G=72.
Source: Prepared by M.A. Durán using data from the Working Population Survey, 3rd Quarter of 2009 (INE 2009).

In 2009, out of all of those in employment almost two out of ten workers were not working during the week in which the LFS for the third quarter was made, which covers the summer months, while only one out of every ten domestic workers stopped working (Table 7.8).

The unemployment figures for the domestic sector are much lower than for the entire working population, although this is in large part due to the fact that it is not regulated (Table 7.9). Unlike what happens in times of economic expansion, in which female unemployment is almost double that of men, in the 2007-2010 crises, men were initially harder hit by the destruction of jobs in the construction and automobile industry sectors. Women employed as domestic workers have a lower unemployment rate than men in the same sector, who typically occupy the more formalised and better paid jobs. Nevertheless, between the first quarter of 2008 and the third quarter of 2009, the number of male workers in the domestic sector increased (15,000 more in employment) while the number of female workers decreased (42,000 fewer in employment).

The publication by the Ministry of Labour and Immigration, Registered Labour Movement, is another important source for the

TABLE 7.8: Percentage of those in employment who were working in the reference week
(horizontal percentages)

	Total (in thousands)	%	Men (in thousands)	%	Women (in thousands)	%
Total in employment	18,870	100.0	10,613	100.0	8,256	100.0
Total in employment who were working	15,707	83.3	9,046	85.2	6,661	80.7
Domestic workers in employment	724	100.0	68	100.0	655	100.0
Domestic workers in employment who were working	655	90.4	61	89.7	594	90.7

Source: Prepared by M.A. Durán using data from the Working Population Survey, 3rd Quarter of 2009 (INE 2009).

TABLE 7.9: **Unemployment rate in working population and among domestic workers**

	Total working population (in thousands)			Domestic workers* (in thousands)		
	Working	Unemployed	% B/A	Working	Unemployed	% B/A
	A	B	C	A	B	C
Total	22,993	4,123	18	816	92	11
Men	12,904	2,290	18	85	17	20
Women	10,089	1,832	18	731	77	11

*Only unemployed who left their job 12 months ago or less are classified by branch of activity.

Source: Prepared by M.A. Durán using data from the Working Population Survey, 3rd Quarter of 2009 (INE 2009).

analysis of unemployment which includes the item of the sector in which the job seeker was formerly working. The status of job seeker is not the same as that of an unemployed worker, because this register also includes workers who are looking for two or more simultaneous jobs, students looking for part time work, those in employment who are looking for a job to change the one they are in, and other similar situations. Only 67.6% of men and 67.8% of women registered as pending job seekers were registered as unemployed¹⁴¹.

The most important information which this source provides is as follows:

- a) 67% of job seekers between 2005 and 2007 were registered as unemployed, and the remaining 33% were not unemployed or were not registered as such;
- b) There are twice as many workers registered as job seekers from the sector including domestic employees and interior

¹⁴¹ As from 3 May 2005, a new Information System for the Public Employment Services (SISPE) came into force, and the methodological instructions changed. *Job seekers' applications* are defined as "the application for a post in the Public Employment Offices, made by workers of working age who wish to work for an employer". This register holds all workers with no employment and those who wish to change their jobs (INE, *Registered Labour Movement*, 2007. Methodological summary).

cleaners in buildings as would be expected in proportion to those employed in the sector. Building cleaners are also in a badly paid sector which serves as a door into the labour market, or as an occasional refuge in times of crisis. These workers only make up 6.6% of the working population, but they produce twice as many pending jobs wanted as would be expected (11.3% of jobs wanted in 2007).

Nevertheless, the jobs wanted do not reflect a more severe unemployment situation than in other sectors, because they are only an indication of a desire to leave the sector and move on to a better job. Out of all those who state that their job is domestic work or cleaning, the percentage of job seekers who are not registered as unemployed is similar to that of all job seekers.

- c) Between 2005 and 2007, the number of job seekers pending resolution remained stable, and even fell slightly, Table 7.10). On the other hand, in the sector including domestic workers and cleaning they went up by 9% (341,000 job seekers).
- d) There are more women than men pending resolution of their applications for work. Women make up 61% of all job seekers pending resolution. They make up 95% of those coming from the domestic workers and cleaning sector.
- e) Between 2007 and 2008 the number of job seekers pending resolution increased by 18.9 % to reach the figure of 3,588,000 pending jobs wanted.
- f) In the branch of “households who employ domestic staff”, there were 321,900 workers registered with the Social Security as being in employment in 2008. The proportion of job seekers in comparison with those registered as being in employment was 4.8%.

7.7. Paid care services inaccessible to medium and low income families

7.7.1. Private hiring of care services

The importance of paid domestic work looking after elderly people can be illustrated by the following data in respect of Spain:

TABLE 7.10: **Jobs wanted pending**

(in thousands)

	2005			2006			2007		
	Total	Men	Women	Total	Men	Women	Total	Men	Women
Total	3,036.9	1,192.6	1,844.3	2,995.4	1,163.2	1,832.3	3,018.1	1,177.7	1,840.4
Included in registered unemployment	2,069.9	818.0	1,251.8	2,039.4	788.2	1,251.2	2,039.0	791.8	1,247.2
Not included in registered unemployment	967.1	374.6	592.5	956.0	375.0	581.0	979.1	385.9	593.2
Households employing domestic staff									
Total	12.6	2.3	10.3	15.7	2.5	13.2	14.6	2.2	12.9
Included in registered unemployment	9.4	1.7	7.7	10.6	1.7	8.9	9.8	1.4	8.3
Not included in registered unemployment	3.3	0.6	2.7	5.1	0.8	4.3	4.8	0.7	4.1

Source: Figures refer to 2007, the latest data available at the INE, using data from the Employment and Social Affairs Statistics Yearbook Registered Labour Movement. Ministry of Labour and Immigration.

of those between 65 and 69 years of age, 12% hire a domestic worker by the hour, and 0.4% hire a live-in domestic worker on a full time basis¹⁴². Among those older than 85 years of age, these figures increase to 22% and 1.7%, respectively; they are higher than the figures for those receiving help from the social services (1.3% at 65 years of age, 7% at 85 years of age). Sometimes the social services are combined with privately hired domestic help (0.2% at 65 years of age, 2.7% at 85 years of age)¹⁴³.

The feasibility of hiring privately depends on the level of income of the employers, the cost of the care contracted, and the existence of other alternatives to the household's own non-remunerated work. Men transfer non-remunerated work to the women of their families (spouse, mother), but women are unable to do the same, with the same frequency and intensity as the men. Men who do not do domestic tasks for themselves, have a lower rate of hiring paid staff to do it in their home, because the women of the household take the work on. When the women of the household do not take this on (and there is no other women to transfer it to), it is twice as likely that the household will hire a paid worker to do so) the figures are 15% and 8% respectively) (CIS 2010b). Table 7.11 illustrates the distribution of household by level of income, weighted by the mean size of household. In reality, the differences in income per person are less than those of households because more than twice the number of people live in high income households than in lower income households, and their income per person would have to be adjusted accordingly. If the figure of 2.71 is taken as the average size of households, those which receive higher incomes are 30% bigger than the average and those with minimum income are of a size (number of persons) which is 42% lower than the national average.

Graph 7.4 shows how many households — on the assumption that no data is hidden and there is no bias in the Family Budget Survey — could hire a full time person under the legal conditions currently in force in Spain for domestic workers, without making

¹⁴² The term "Domestic worker" is that used in the survey (CIS 2006).

¹⁴³ The data from Study No. 2844 of the CIS point in the same direction. Out of those interviewed who said that they do not personally take charge of the household tasks, the percentage who said that a hired person does so increases with age until it reaches 19% among those older than 65 years old.

TABLE 7.11: Households, persons, and average size of household by level of regular net monthly income of the household, 2008
(percentage)

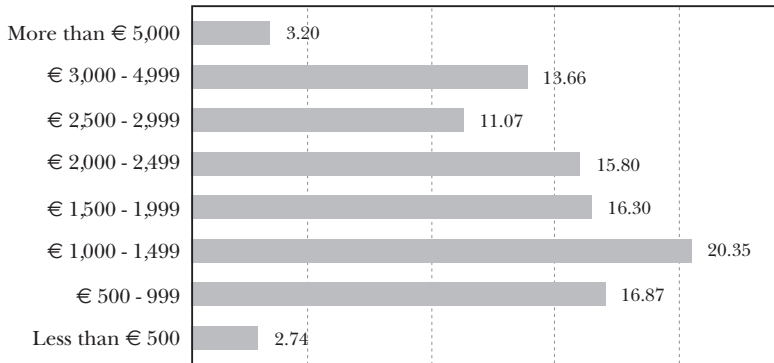
	Households	Percentage	Persons	Percentage	Average size of household	Percentage of mean size
Total	16,568,046	100.00	44,824,872	100.00	2.71	100
€ 5,000 or more	530,493	3.20	1,873,469	4.18	3.53	130
From € 3,000 to 4,999	2,263,765	13.66	7,676,582	17.13	3.39	125
From € 2,500 to 2,999	1,834,893	11.07	5,850,092	13.05	3.19	118
From € 2,000 to 2,499	2,617,553	15.80	7,781,751	17.36	2.97	110
From € 1,500 to 1,999	2,700,678	16.30	7,542,036	16.83	2.79	103
From € 1,000 to 1,499	3,371,437	20.35	8,250,061	18.41	2.45	90
From € 500 to 999	2,795,592	16.87	5,141,266	11.47	1.84	68
Up to € 499	453,635	2.74	709,616	1.58	1.56	58

Source: Prepared by M.A. Durán using data from INE, the Family Budget Survey 2006 Base (INE 2008).

allowance for the number of people who live in the household. As is normally done in the case of the grant of housing loans, it can be assumed that the upper limit which households can devote to this item if they give it extraordinary priority would be 30% of their income, because they need the rest to satisfy other basic necessities. Even supposing that hiring does not give rise to any complementary expenses (in housing, transport, food, telephone, etc), only 16.86% of households can hire a full-time domestic worker under the legal conditions which are in force in the same year as that in which the Survey was made (€ 699.90 base for contributions to the Social Security and € 128.08 employer's contribution to the Social Security, giving a total of € 827.98). These are households which belong to the highest income level (3.2% of all households) and to the second level (13.66% of all households).

In the year 2009, the Social Security contribution base was € 714 per month. The contribution rate was 22%, of which 18.30% was the employer's contribution, and 3.7% the employee's contribution. In the year 2010, the Social Security contribution base was € 738.90 per month, and the contribution rate was 22%, of which 18.30% was the employer's contribution, and 3.7% the employee's contribution.

GRAPH 7.4: Distribution of households by monthly income, in Euros
(percentage of households)



Source: Prepared by M.A. Durán using data from INE, the Family Budget Survey 2006 Base (INE 2008).

The employer will also pay an additional contribution of 0.1%. In total, an employer paying the full basic contribution will pay € 902.20 (€ 738.90 + € 162.56 + € 0.74). In the year 2011, the minimum wage in Spain was € 641.40. For domestic employees, the minimum wage was set at € 5.02 per hour worked and the annual full time wage may not be less than € 8,970.60.

For households at the second income level, this payment would consume 30% of their financial resources almost entirely. At the remaining levels, it would exceed the proportion of the household income which has been defined as the feasible limit. In fact, as the sources consulted have already demonstrated, the majority of households which hire domestic workers only hire part time, and with few hours per week. If the expense is reduced to one quarter of what would be due to a full time worker (€ 207 per month), then a large proportion of households can afford it. The 11.17% comprising those belonging to the lowest income levels (all those below € 500 per month) and half of the next higher level are outside this proportion.

Since the households in which the reference person is a woman have lower incomes, hiring paid workers is less feasible for these households.

The employment of paid domestic work does not depend only upon the income of the household. At very high levels of resources, the workers who provide the services of cleaning and care do not do so via the channel of this official regime, but they are linked to the business activities of their employers or to organisations and corporations (companies, diplomatic representations, political parties, religious bodies) to which those receiving the services belong, and as such they are considered to be a cost of production and their contributions come under the General Regime. Others provide the service through specialist companies, which guarantee their clients the services of “professionalised” employees, in addition to the complementary services of selection, substitution in the event of holidays, sickness, or leaving the job, and legally these are also not domestic employees, although in social terms they are.

At medium income levels, hiring paid domestic work presupposes an extraordinary effort to which households only have recourse under exceptional circumstances, such as sickness, or the absence of public services for the care of small children. Hiring does not fit into the classification of stable current expenses to which they normally devote a part of the monthly income of the household, but rather to into the category of acquiring a loan or a mortgage, which is paid out of previously accumulated wealth, or it is hoped to amortise it in the future under more favourable circumstances. In the case of dependent sick people of advanced age, the cost of hired domestic work is frequently higher than the pension or the income which the sick person receives each month, and payment is made by means of help from other households or premature sale of the property of the sick person. Nor is it infrequent for employers to attempt to raise income from their property assets in order to compensate for low income, by offering accommodation in return for care, and some universities, for example, have proposed similar formulas for accommodation for their students. Be that as it may, as has already been indicated on previous pages, at low levels of income it is virtually impossible for 30% of total expenses to be devoted to hiring paid care services. The average level of income of those who received old age benefit is € 817, of those receiving invalidity benefit € 632, and of those on sickness benefit € 345. It is precisely at these levels where there are most people without prop-

erty resources, who are physically dependent, and who have no other living family to take responsibility for their care. Those who most need the services are those who can least afford to pay for them.

In short, the acquisition of high volumes of work in the Spanish labour market to produce paid services in households is only possible in five types of household:

- a) those which belong to the last income decile under the IRPF personal income tax;
- b) those which *combine various different earners* of medium and/or high incomes;
- c) those which receive *multiple support* from other households;
- d) those who *sell or let previously* obtained capital (at-sight savings, deposits, investments, real property assets, pension funds, reverse mortgages, etc.) whether or not finally visible.
- e) those who *incur debt* in order to purchase the services, or transfer the debt to other households.

Just the same as for companies, the capacity to purchase labour for households is greatly influenced by the degree to which the market is regulated, and its openness or otherwise to the international labour markets. In the year 2009, the monthly wage established as the contribution base for domestic workers in Spain was higher than the annual per capita income of the majority of countries. Only 62 countries have a higher per capita annual income, and even in the most developed countries there are such internal inequalities that large sectors of the population live on annual incomes lower than the minimum monthly wage established for domestic workers by Spanish legislation.

Spain is not an exception, and the forms of employment are the principal consequence of the productive structure and the distribution of income, although the inverse causal relation also occurs. Medium and high income households have the financial capacity to hire enormous quantities of hours of work at a low price in the rest of the world, and there are millions of workers in the rest of the world who would happily exchange their current jobs for the devalued domestic jobs in the developed countries. Neither the house-

holds nor these potential foreign workers will ever meet because apart from each concrete job, what is really at stake here in the developed countries are the working conditions of the other workers who have already settled in, and their share of the common wealth of public goods and services.

7.7.2. How much money are households prepared to spend on care?

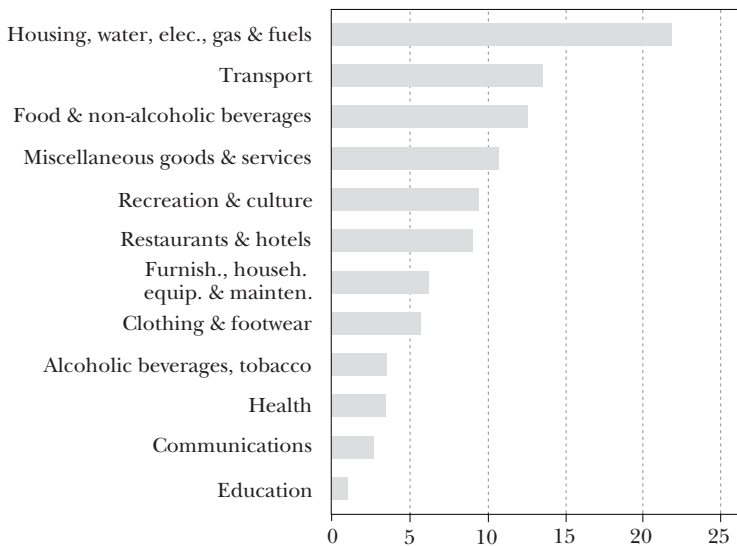
Households have a moderate decision-making capacity in respect of their resources. A large part is absorbed directly by the State, and on a mandatory basis by the Social Security, Personal Income Tax (IRPF), and other direct and indirect taxes, in respect of which the jurisdictions are geographically and functionally scattered. The State administers public resources and in consideration offers counterparts to households and therefore there is no exact correlation between what is first given and what is then received. In Spain, the view of the public of the correspondence between what the State takes and what it returns is the object of systematic analysis by the Institute of Fiscal Studies. In some countries and in some periods, the State prohibits the consumption of certain goods and services, or makes it extraordinarily difficult while it offers incentives for others.

The Family Budget Survey (*Encuesta de Presupuestos Familiares – EPF*) is the statistical instrument with the greatest international scope for the study of the costs expended by households. Its methodology has the priority objective of “estimating expenses as an instrument for obtaining private consumption in the National Accounts”. The expense on consumption recorded in the EPF has two very different components from a methodological point of view. The first, and most voluminous, is the “monetary flow which ties the households and each of their members to the payment of certain goods and services considered to constitute final consumption”. This may be subdivided into the expense incurred by the household as a whole (on its behalf) for the household as a whole, and the remaining cost. The second component of the expense for households is not obtained directly, but indirectly by estimation: this is the value of “self-consumption, self-supply, payment in kind, free or subsidised meals, and rent assigned to the housing in which the household lives when it is the owner of the dwelling, or it has been

assigned to them free of charge or semi free of charge by other households or institutions” (INE 2008, 4).

For major expenditure groups, final consumption of households in Europe is distributed in the manner illustrated in Graph 7.5. It does not take much imagination to think of how this distribution would change if households did not have the resources of non-re-munerated work.

GRAPH 7.5: Distribution of consumption expenditure of households in Europe-27 (2006)



Source: Eurostat (2009, 88).

In the case of Spain, the final consumption of households is distributed in a similar manner to that of the rest of Europe. The data expenditure for the year 2009 is similar to that of 2008, although the total has fallen by 3%. The group which has reduced its expenditure most is transport (-14.9%), with clothing and shoes falling (-8.3%), furniture, fittings and other housing costs (-6.0%)¹⁴⁴.

¹⁴⁴ The INE published some results of the Family Budget Survey 2009 on 27 October 2010.

TABLE 7.12: **Total expense, average expense, and percentage distribution of total expense, by groups of expenditure, 2008**
(in thousands of Euros and in percentages)

	Total expenditure	Percentage distribution	Average expenditure per household	Average expenditure per person	Average expenditure by consumption unit*
Total	534,941,265.0	100.0	31,953.2	11,801.4	17,959.3
1 Food and non-alcoholic beverages	77,803,750.4	14.5	4,647.4	1,716.4	2,612.1
2 Alcoholic beverages, tobacco and narcotics	10,323,429.4	1.9	616.6	227.8	346.6
3 Garments and shoes	32,781,288.7	6.1	1,958.1	723.2	1,100.6
4 Housing, water, electricity, gas, and other fuels	145,761,710.9	27.3	8,706.7	3,215.7	4,893.6
5 Furnishings, household equipment, and current maintenance expenses	27,819,904.8	5.2	1,661.8	613.7	934.0
6 Health	17,138,303.9	3.2	1,023.7	378.1	575.4
7 Transport	73,046,184.2	13.7	4,363.2	1,611.5	2,452.3
8 Communications	16,252,560.3	3.0	970.8	358.6	545.6
9 Leisure, shows, and culture	36,847,578.9	6.9	2,201.0	812.9	1,237.1
10 Education	4,936,410.5	0.9	294.9	108.9	165.7
11 Hotels, cafés, and restaurants	51,374,988.3	9.6	3,068.7	1,133.4	1,724.8
12 Other goods and services	40,855,154.6	7.6	2,440.4	901.3	1,371.6

* The modified OECD scale has been used to calculate the consumption units. The total expenditure in thousands of current Euros was: €534,941,264.97
Source: Family Budget Survey, 2006 Base (INE 2008).

Notwithstanding its apparent clarity, Table 17.12 may suggest a fairly erroneous idea as to how household resources are distributed. That is why it is necessary to repeat that these figures only refer to direct consumption and they say nothing about the resources which the Public Administration absorb and manage. The economic effort which households make in aggregate in health, transport, communications, or education is in reality much higher, but it is not made visible because the greater part of the household expense in these services is made indirectly through the State. The distribution of the expense between these entries is not homogeneous between all social groups, and it would be even more heterogeneous if it included the information about the consumption of public assets which different types of households make.

The view of household consumption which is offered by the National Accounts is rather different from that given by the EPF. Although the first uses information which comes from the second, the view of the National Accounts is more complex, it is based upon more sources of information, and it incorporates the observation of the relationships between households and the State (Table 7.13).

The figures provided by the INE on household expenditure vary considerably depending upon whether or not the theoretical income which would come to them if they let the family home is included. For the purposes of inter-annual comparison it is also neces-

TABLE 7.13: Households per National Accounts, 2008
(millions of Euros)

Adjusted gross disposable income	838,428
Adjusted net disposable income	766,000
Final consumption expenditure	613,016
Gross saving	92,066
Net saving	40,340
Effective final consumption	74,204
Change in net wealth due to saving and capital transfers	4,069
Financing capacity	6,488

Source: National Accounts of Spain, 2000 Base. Accounting tables 2000-2008. Accounts for total economy and for institutional sectors. Household Sector (INE 2010).

sary to monitor the effect of inflation insofar as it is possible (constant prices), and sudden changes in the size and distribution of the population (migrations). With regard to inflation, the total of household expenditure according to the EPF of 2008 in current Euros was 6% higher in 2008 than in 2007, but in reality, if it is expressed in constant prices, it fell 1.4% lower (-1.4%). The mean annual household income and that for private people was 20% higher when the theoretical value of the rent on the owned accommodation is assigned, than when this was not done.

From the perspective of non-remunerated work, the assignment of the theoretical rent is of great methodological importance, and the same goes for self-served or self-supplied goods. If a farmer produces oranges and does not sell them but consumes them at home, that is considered to be a part of gross domestic product (GDP). On the other hand, if a consumer purchases a piece of furniture in kit form, takes it home, and assembles it himself, and so saves himself the difference in price, only the value of the piece of furniture at the moment it is purchased is counted towards GDP¹⁴⁵. In just the same way as the EPF attempts to contribute to the understanding of the self-consumption of goods, it makes the conceptual shortcomings in respect of the self-consumption of services more visible. If an orange not sold and self-supplied is a part of GDP: why shouldn't the work of a mathematics teacher who teaches his children to do square roots or polynomials also be?

Other sources permit different approaches to the valuation of the total expense in domestic services¹⁴⁶, using the Time Use Survey 2002-2003. Angulo and Casero evaluate annual remunerated domestic work by analogy with the legally determined minimum wage per hour (*Salarios mínimos interprofesionales* – SMI). For that year it is less than that obtained using data on incomes given by those interviewed in the Time Use Survey whose job is that of domestic worker (€ 558.80 per month). The authors consider this procedure to be preferable, and it leads to an estimate of their annual value at

¹⁴⁵ Making the cost of transport and assembly visible, which the consumer can save by doing it themselves, has contributed decisively to the commercial success of some large multinational businesses such as IKEA. In the case of some products these services can increase the value of the initial price of the object by 40%.

¹⁴⁶ This is the terminology employed by the Time Use Survey, INE 2002-2003.

€ 3,373.60 millions for the year in progress. From another point of view, this figure is what households spend in substituting a part of their non-remunerated work by remunerated work.

The COICOP (Classification of Individual Consumption by Purpose), agreed and registered by the United Nations, classifies the domestic service expense in Group 5.6, entitled “goods and services for current maintenance of the household”, and associates it with the expense in glassware and crockery (point 5.4) and differentiates it from the expenses on health (point 6), education (point 10), or personal care (point 12.1).

According to the EPF, in 2007 the expense in domestic service was € 5,627,069,700, to which € 170 million must be added for contributions to the Social Security. The expense grew by 2.8% in comparison with the previous year, but the Social Security expense fell by 12.1%. If the comparison is made at constant 2006 prices, the expense remained stable and the payments to the Social Security fell by 19.64%. 60,000 workers deregistered with the Special Regime for Domestic Workers between 2006 and 2007. These deregistrations would explain the fall in payments to the Social Security, but the data item that the amount devoted by households to wages has increased, makes it more probable that there has been an increase in work in the hidden economy and in part time working where the obligation to contribute to the Social Security falls upon the worker themselves.

Overall, adding the Social Security expense and other expenses, the expenditure on domestic service according to this source was 1.11% of the total expenditure of households in 2007. The average expense per household was € 356 per year. The average expense per person was € 130 per year. What these figures do not tell us is how much households would be prepared to pay for remunerated domestic work if the non-remunerated domestic work on which their daily life depends were to stop being available to them.

8. Who will take care of dependents in the global economy?

8.1. The concept of dependence and the construction of scales

8.1.1. Population ratios

The prediction of future demand for care is a matter of great social, economic, and political importance. For the time being, an advance has been made in the quality of demographic predictions (future composition of the population by age and by gender) which has not been accompanied by parallel progress in the knowledge of the needs for care of each group, depending on their social characteristics. The concept of *dependence* implies the need for help. It is distinguished from *disability* in that the latter only implies a limitation on certain activities, and may cause dependence or in favourable circumstances not do so. According to the Household Panel of the European Union, the percentage of people who provide daily care to adults in Europe is 5.5% (2.3% of men and 8.4% of women); the most frequent case is for them to devote between 20 and 39 hours per week, but 23% spend more than 60 hours per week on this (PHOGUE 2005). In Spain, according to the Informal Support Survey carried out by Imsero, only 9% of elderly people are dependent. The activities for which dependent people most frequently require help are the least physical ones (among dependents more than 92% need help in carrying out official business, purchases, or going to the doctor), but it is also very frequent that they need help in carrying out domestic chores (91.7%, using public transport (81.9%), going out (77.6%), taking a shower (75.6%), etc. The use

of the telephone remains feasible for a longer time, because only 55.4% cannot use it. Less frequent, but more incapacitating, is dependence for going around the house (38.7%), or the need for help in changing incontinence pads (35.4%) (Herranz 2007).

Dependence indices do not weight, they only express a ratio. In other words, they weight the entire population with one unit of care. This division of population by the United Nations defines the *dependence rate* as the sum of the population between 0 and 14 years old and that of more than 65 years old, divided by the potentially working age population (15-64 years old). In other words, the *dependence ratio* is $[d = [(0-14) + (65 \text{ and } +)] / (15-64)]$. The *infant dependence ratio* is the ratio between the population of 0 to 64 years and the population of 15 to 65 years old. The *elderly dependence ratio* is the ratio between the population of more than 65 years old and the population of 15 to 64 years old. All of the ratios are expressed as percentages (UN 2009).

Other indicators extend the working population up to 74 years old in order to establish the *potential carer index*. The Latin American and Caribbean Centre for Demographics (Centro Latinoamericano y Caribeño de Demografía – CELADE), defines *potential carer* or carer capacity following a proposal from the United Nations as “the ratio between people from 15 to 75 years old and the total population” (CEPAL 2009, 219).

Another population ratio proposed by the Population Reference Bureau is what is known as the *oldest-old support ratio* or the proportion between those over the age of 85 years old and those who are between 50 and 64 years old. In the year 2010, the minimum ratio between the very old and the old is to be found in France, Italy, and Sweden, with 10 people who are potentially carers. Spain, Japan, Switzerland, and Norway have 11, and no countries reach 20. By the year 2050, Japan will have only 3, and many countries will not reach 5. The alternatives to the traditional modes of care will be technical care (carer robots) and informal care (Tsai 2010). Care which exceeds what this model can provide will have to be transferred to paid public or private care, or creating new forms of social organisation which still do not exist.

In addition to the demographic definition of dependence, the term is habitually used in daily life in two other meanings, financial

dependence and physical dependence. *Physical dependence* is usually classified on two levels, depending upon whether only some instrumental activities are affected, or basic activities are profoundly affected. The incidence of the first type is twice that of the second. Physical dependence is strongly associated with *financial dependence*, although one may occur without the other (unemployment, insufficient retirement pensions, personal wealth, etc.).

Children, sick people, and elderly dependents are unable to sell their labour directly on the market; they are financial dependents, and the provision of the care which they need has to be effected by routes outside the market, especially through:

- a) their own family;
- b) the State;
- c) non-profit making bodies;
- d) the market, whether indirectly as an advance against the value of the potential labour (in the case of children), as a deferred payment (for the elderly), or as an insurance policy against the risk (for the sick).

In Spain over the last few decades there has been an expansion of the middle class and an improvement in the level of education of the youngest, which marks the results presented in Table 8.1. Socio-economic levels are associated with age, and therefore in the middle

TABLE 8.1: **Presence of relations who are dependent because of age or illness, by socio-economic status**

	A ₁	A ₂	B ₁	B ₂	C	D
	Yes, children of 3 years old or less	Yes, children from 4 to 16 years of age	Yes, adults with moderate dependence	Yes, adults with high dependence	Yes, older than 74 years of age	Cumulative, dependent relations
Total	27.5	48.5	14.4	11.2	37.5	139.1
High	31.8	51.2	13.8	10.6	38.6	146.0
Medium	26.9	50.8	13.3	13.1	36.0	140.1
Low	21.5	40.4	17.3	8.8	38.5	126.5

Source: Prepared by M.A. Durán using data from the Time Use Survey (Encuesta sobre Tiempos de Cuidado) (CSIC 2009).

and high levels, there is a greater proportion of people with children in the close family circle, both little ones and from four to sixteen years old. For the purposes of social policies, the consequence is that Spanish children are relatively rich. A high proportion belong to households, or are recognised as close family by persons with a comparatively high or medium socio-economic status. This dimension does not prevent households with children to which a strictly monetary criterion for the evaluation of resources is applied (per capita or per consumer unit resources index) from showing lower indices than the remaining types of household.

The data on dependent adult relatives are less clear than those in respect of children. 14.4% of persons have some adult family member with moderate dependence, and 11.2% with high dependence. The proportion of people with close family older than 74 years of age is distributed in a fairly homogeneous manner between all socio-economic levels, at about 37.5%.

The demand for non-remunerated work in a country is elastic, both in terms of the number of persons who embody the demand and in terms of the intensity of the demand by each person. *Aggregate demand* is the sum of individual demand and may be estimated for the entire population resident in a country or for specific populations. Age is one of the key variables in estimating demand, given that the number of people in each age group suffers major changes throughout the demographic and historical cycles.

8.1.2. Scales of demand for care

The construction of scales for the demand for care is parallel to the creation of charts for examining dependence. The charts are of major economic importance when they serve to determine indemnities, subsidies, or any other type of financial transaction. Thus, Rodríguez Castedo and Jiménez Lara estimate that following the implementation of the system of support set out in the law on dependence, the number of people with recognised severe level dependence has doubled initial previsions, although the real prevalence has not changed. In many cases the degree of dependence of people who were already receiving assistance in residential centres has been increased in order to gain greater aid from the State (Rodríguez Castedo and Jiménez Lara 2010, 159:32, 33).

For the purposes of international comparison, according to the charts set up, dependence ratios are very variable even though they are applied to the same population; for example, in Spain more people would be recognised as being dependent than in Germany, and many more than in France, where those below the age of 60 years old are excluded. If dependence is recognised in the case of people with little real dependence, the cost of the application of any law will exceed its budget allocation, and in practice nullifies the effect, and reduces it to a mere declaration of intentions.

The dependence charts are applied to a population with special health characteristics who require more help than the rest. Unlike the Madrid scales and those derived from them, which we will discuss below, dependence charts do not take into consideration the need for care among children or among the rest of the population who are in a normal state of health.

For the purpose of public policies, it is indispensable to predict the demand, the budget allocation which is to be provided by the State for attending to it, and the manner of putting it into practice in administrative terms. The intensity of dependence is classified on a three point scale: level I corresponds to moderate dependence, level II to severe dependence, and level III to major dependence. The forecast of dependent persons in Spain for the year 2015 is shown in Table 8.2.

Forecasts of the number of dependent people based upon demographic and medical criteria are only one starting point in the estimation of formally recognised dependents. In practice they are

TABLE 8.2: Forecast dependent population by age and degree, 2015

	Level I	Level II	Level III	Total
Up to 64 years of age	210,449	90,092	42,861	343,402
From 65 to 79 years of age	209,125	113,429	59,719	382,273
More than 80 years	179,185	271,863	214,577	665,625
Total	598,759	475,384	317,157	1,391,300
Percentage of total population	1.3	1.0	0.7	3.0

Source: Prepared by M.A. Durán using data from Rodríguez Castedo and Jiménez Lara (2010).

transformed by the action of other criteria, such as the utility perceived by the dependents of their family members and representatives in being recognised by the authorities. The lack of information, the complexity of the procedures, lack of confidence that they will actually receive aid, the sum in comparison with other resources, and fear of the loss of self-esteem are some of the reasons why the number may fall below or exceed initial forecasts.

Public care services for dependents make forecasts of the staff needed to attend to them, expressed principally as a ratio per user. They do not refer to all of the attention, but only to that provided by the public services. Table 8.3 illustrates the staff ratios per user attended established in Spain, for those older than eighty years of age.

As for all care services, the limit in the degree of dedication is elastic, and it is the rigidity of the supply which most determines the crossing point between supply and demand. The demand may grow exponentially if users require more cover and new, better quality services. It is not only the aspirations and expectations of the dependents which contribute to this, but those of the employees who take care of them and whose interests are in line with the quality and quantity of their own jobs.

Table 8.3 does not refer to the degree of cover, but to the estimate of the staff per user attended ratio, which is not exactly the same as the quantity and quality of service. Nor does it refer to the

TABLE 8.3: Ratio of staff per assisted user of greater than 80 years old, forecasts for 2011 and 2015

	Level of Dependence								
	Moderate			Severe			Major Dependence		
	2011	2015	%	2011	2015	%	2011	2015	%
Remote assistance	0.01	0.01	0	0.01	0.01	0	0.01	0.01	0
Home help	0.25	0.35	40	0.50	0.60	20	0.7	0.80	14
Day or night centre	0.30	0.40	33	0.35	0.45	29	0.45	0.50	11
Residential centre	0.45	0.50	11	0.55	0.60	9	0.75	0.85	13

Source: Prepared by M.A. Durán using data from Rodríguez Castedo and Jiménez Lara (2010).

cost, although this can be considered proportional if the internal composition (qualification) and remuneration of the staff are maintained stable. Estimated growth in the staff ratio over the four-year period 2011-2015 is higher for moderate dependents than for those with great dependence. No changes are expected in the “tele-assistance” service, which is what uses the least staff¹⁴⁷, but a growth of 40% is expected in home help for moderate dependents. The final cost of attention will depend upon the number of users receiving it, the services received, and the cost per service (wage and others).

8.1.2.1. *Madrid scales I and II*

One of the instruments for measuring the demand for non-remunerated work is the Madrid scale. The *Madrid I scale* was designed and applied for the first time in this city in 1998, and consisted of a very simple scale, intended to weight the demand for non-remunerated work by age groups. It arose as a counterbalance to what was known as the *Oxford scale*, now more commonly referred to as the *OECD scale*, which is frequently used in Europe in studies on poverty to weight the consumption of goods in households, by applying the criterion of decreasing costs depending on the composition of the households. The Oxford scale is simple and easy to use. The first adult in the household is weighted with 1 point. The second and following adults are weighted with 0.7 points, because it is understood that they benefit from the decreasing cost of the use of common goods (living space, energy, facilities and tools, etc.). Children of less than 14 years old are weighted with 0.5 points, because it is understood that their necessities in consumption are less than those of adults. Thus, for example, a household composed of one single adult would score 1 consumption unit. A household composed of two adults scores 1.7 consumption units; a household composed of two adults and three children of less than 14 years old scores 3.2 consumption units in total ($1+0.7+0.5+0.5+0.5$). Other, modified, OECD scales ascribe 1 point to the first adult, 0.5 to successive

¹⁴⁷ This service was more susceptible to the incorporation of new technology. Their traditional services are communications in the event of an emergency. This permits sophisticated communications such as the measurement of vital constants or visual communication by means of the television screen.

adults, and 0.3 points to children. These scales are very useful in evaluating and comparing situations of monetary poverty, but are not suitable for evaluating welfare or for comparing needs for non-remunerated work because both children and the elderly have more need for care than adults of intermediate ages. That is why the Madrid scale (Durán 1998), was designed and began to be used, in a simple, easily used format, although it is rather more complex than the Oxford scale. The population from 15 to 64 years old, normally defined as the *potential working population* was considered to be the reference population with a weighting of 1 point, equivalent to the demand for one unit of care per person. This weighting is not equivalent to any determined quantity of time, but to the average time which is demanded by the population of that age taken as a whole, which includes very diverse demands (men and women, in and out of employment, healthy and sick, etc.). In outline the potential working population is equated to the *population of potential carers* which is in turn defined in a different manner by different institutions. Children of less than 4 years old, with 2 points, those of ages falling between 5 and 14 years old with 1.5 points, and adolescents from 15 to 17 years old with 1.2 points. Those over the age of 85 years old are assigned 2 points; those of between 75 and 84 years old, 1.7 points; and those of between 65 and 74 years old, 1.2 points.

The Madrid scale is applied both to specific households and to the overall population of an entire country, or to other social groups and categories. It has been replicated on a number of occasions, and has served as the starting point for other scales for the demand for care.

The Oxford scale employs relatively well-known variables, such as the distribution of the members of households by age. It is usually applied in research studies which have information on earnings (income) or expenses (consumption), supplied by the Family Budget Surveys (EPF), censuses, the System of National Accounts, and other sources. Less well-known are the data on assets available in households, which is important information in comparative analysis between social groups. In order to apply the Madrid scale and its derivatives, rather more complex demographic data are required than for the Oxford scale, given that it weights children differently according to their age, and above all, distinguishes between adults of central ages and adults of advanced age.

The Oxford scale refers to the consumption of monetarised goods and services within each household; initially, the Madrid scale was conceived similarly as a scale for the consumption of non-remunerated work within households. The Oxford scale is not based upon prior *ad hoc* empirical studies on the distribution of the consumption of material goods in households, it is what is known as a *convention based upon expert opinion*, and the same is true of the Madrid scale¹⁴⁸. In addition to the demographic information, the utility of the Madrid scale is improved if it is able to rest upon information about the time in fact devoted to care, something which is currently provided principally by the Time Use surveys. The technical development of the Madrid scale has generated or called attention to new concepts, when they are put to use give rise to demands for information and figures which are also different. Some of these concepts are:

- a) *Satisfied or unsatisfied demand.* The majority of the Time Use Surveys offer detailed information on “behaviours”, but not on “expectations, aspirations, or demands”, and still less on “needs”, whether they may be satisfied or unsatisfied. There also exist services which could be conceptualised as care, sometimes imposed against the will of those receiving them (for example, mandatory schooling, mandatory vaccination, mandatory accommodation for beggars under extreme conditions, etc.). As we have already discussed in detail, the concepts of need, demand, and consumption are not synonyms, although frequently they are used as such.
- b) *Institution and place in which the demand for care is satisfied.* The concept of care requires a careful definition, and for the purposes of comparison, this should be based upon agreement. Social and cultural conditions cause the same expression to hold different content in different places. For example, the concepts of *cuidado*, *care*, and *soin* are not exact equivalents (Durán 1998) although they are used as such; in common

¹⁴⁸ It is similar to the delphi studies, in that they do not assume representativity, but they do have a greater knowledge of the topic than the general population or the politicians who have to carry out the decision-making.

usage in Spanish, English, and French they contain different proportions of physical and affective activity, and giving responsibility to the other. Similarly, in every country and social group there is a difference in the proportion of self-administered care, care administered by other members of the same household (paid or not paid), by family members resident in other households, purchased on the market (at free prices or at subsidised prices), received through the public services (free of charge or against the payment of fees), or provided by volunteer organisations (donations, non-profit cooperatives, etc.). For the purposes of comparison, it is necessary to delimit with the greatest clarity possible the type of care to which the comparison refers, but in fact it is difficult to achieve this in view of the heterogeneity and scarcity of sources in this field, still relatively new, and because of the difficulty of segregating the person receiving the care when it is a collective service (for example, cleaning from which all members of the household benefit).

- c) *Demand by categories and aggregate demand.* The aggregate demand of a group is found from the integration of the demand of the social groups which make it up. For some purposes it is very appropriate to effect the analysis by comparison between categories (for example, the characteristic demand of those over the age of 80 years old in various different countries), but in other cases it is more appropriate for the analysis to be based upon the aggregate demand, which takes into account the volume of each social group within the whole. Since the composition of the population varies over time, and is different for every country, comparative analyses have to incorporate this variation in their projections.

Subsequently, the Madrid I scale has given rise to many other scales, which have adopted the name of the place where they were applied. Some have been used in the analysis of the demand of an age group in greater detail (for example, of young people, or of children), or of some specific components in the demand (for example, the care of sick people). All of these have a common starting point, which is the application of a relational scale of the demand

for care time depending on the composition of the population under study by gender and by age.

Initially intended to understand the demand, the Madrid scale and its derivatives has been employed for more than a decade to create distribution scenarios, dividing the aggregate or specific demand of some group among the institutions which contribute to satisfying it (family, public services, etc.), or between groups of population (in or out of employment, men and women, single and married, etc.). It is applied to historical series and the life cycle, and is considered to be a complex dependency indicator, of use in the adoption of public policies.

From the micro point of view, it is useful to apply it in the evaluation of the load of demand in different types of households and in specific households. In Latin America, the model of the stable two-parent family in which the household demand can be divided between two adults is a minority in many social levels. Urban households with a female reference person increased considerably between 1990 and 2007, and they make up 23% of households in Guatemala and in Peru, and 40% in Nicaragua. The percentage of people born to unmarried couples has also increased considerably and now exceeds 50% in Argentina, Chile, Costa Rica, El Salvador, Panama, Paraguay, and Uruguay (CEPAL 2009, 188). In all of the countries in the region, there is a high proportion of single parent households in all social strata. In the Dominican Republic, Argentina, Costa Rica, Venezuela, Chile, and Panama they make up almost 40%. The proportion is even higher in households with the least income (CEPAL 2009, 159), which means that the care load frequently falls upon just one adult alone.

In the year 2010, a modification was made to the Madrid I scale, for the purpose of making easier use of the rich demographic information supplied by the United Nations through the World Population Prospects, and it took the name of the *Madrid II scale*¹⁴⁹. The age categories were adapted to the simplified model in which they are presented in the World Population Prospects. The weighting given to the central age group was maintained at one point, al-

¹⁴⁹ Their first results were shown on 10 September 2010 in Rio de Janeiro in the inaugural speech of the *International Seminar on the Use of Time*.

though it now refers to the group from 15 to 64 years old instead of the group from 18 to 64 years old. The weighting of the remaining groups was also slightly adjusted. In the basic version of the Madrid II scale, there is no differentiation between the demand satisfied by non-remunerated carers in the receiver's own household (self-maintenance, family care), individual remunerated or non-remunerated carers resident in other households, carers belonging to private companies, public services, and volunteer organisations. The scale was applied in identical fashion for 1950, 2010, and 2050, although a more detailed treatment would require it to be modified in order to adapt it to other changes, such as the different composition of ages in the reference group (15-64 years old) and the foreseeable change in individual demand for care between the beginning and the end of the period under study. In this chapter the Madrid II scale is the one most used. It is a more schematic scale than any of the other scales derived from the Madrid I scale, but matching it to the framework employed by the United Nations has made it possible to carry out demographic projections that in any other way have required excessive effort and would not have been done (Table 8.4)

TABLE 8.4: Proportionality between the Madrid I scale and the Madrid II scale

Age groups	A	B	C
	Madrid I scale	Madrid II scale	Ratio B/A
0-4 years of age	2.00	3.00	1.50
5-14 years of age	1.50	2.00	1.33
15-17 years of age	1.20	1.00	0.83
18-64 (reference group) 1 unit	1.00	1.00	1.00
65-74 years of age	1.20	2.00	1.67
75-84 years of age	1.70	2.00	1.18
85 years of age and above	2.00	3.00	1.50

Source: Prepared by M.A. Durán.

8.1.2.2. *The Santiago de Chile scale*

A course on “The redistribution of time. An indicator of equality” took place in Santiago de Chile in the year 2008, at the Latin American Economic Commission (Comisión Económica para América Latina - CEPAL); 21 experts in social affairs and statistics from Latin America took part. A proposal was made there to estimate the demand for care in the country of each participant, using the same age groups as in the Madrid I scale¹⁵⁰. The participants came from Argentina, Brazil, Chile, Colombia, Costa Rica, Ecuador, Spain, Honduras, Mexico, Paraguay, Uruguay, and Venezuela. Each participant prepared their own scale to weight the demand, while retaining as a common feature that the demand of the central age group (15-64 years old) should be weighted with one point. It is not, therefore, a question of scales which assign a “quantity of time” devoted to care, but only a “proportionality” with respect to the central age group. Unlike the Madrid I scale, the basic concept used was not “*non-remunerated work*”, but *care* in the home. 21 scales were prepared, one by each expert, which revealed not only the regional differences, but also the diversity of assessment between participants from the same country. In other words, the heterogeneity of the scales revealed that the volume and distribution of non-remunerated work in their own countries is very little understood, even by experts.

Table 8.5 shows the estimates carried out in that course, and the average of these estimates has given rise to a new scale, identified as the *Santiago I scale*¹⁵¹. Although averages can be more useful and easily managed than any other statistical procedure, from a methodological point of view other criteria are of equal interest, such as the dispersion of the estimates, the concentration of the dispersion (measured as a ratio and as a difference) in the groups at the extremes of the life cycle, and the possible causes of heterogeneity in the assignment of demand.

It has been decided not to use the Santiago scale in this chapter in order to facilitate the comparison between the estimates for Latin

¹⁵⁰ This was a brainstorming type seminar which lasted some three hours.

¹⁵¹ I am grateful to Mónica Domínguez, a participant in the Seminar, for keeping the scale among her notes, because I mislaid mine. I am also grateful to all of the other experts for their enriching comments throughout the course and in their subsequent work.

TABLE 8.5: **Santiago scale. The demand for care in the infant, juvenile, and third age populations in Latin America***

Age groups	Specialist												
	1	2	3	4	5	6	7	8	9	10	11	12	13
0-4 years of age	5	4	4	10	17	5	4	8	6	5	5	3	3
5-14 years of age	3	3	3	5	10	3	3	5	4	3	4	2.5	2
15-17 years of age	3	2	2	2	4	2	2	2	3	2	2	1.2	2
18-64 (reference group) 1 unit	1	1	1	1	1	1	1	1	1	1	1	1	1
65-74 years of age	2	2	2	2	10	2	3	2.5	2	2	2	1.5	2
75-84 years of age	4	3	3	5	18	4	4	3	4	4	4	2.5	1
85 years of age and above	5	5	4	10	20	6	5	4	6	4	4	4	1
Demand index	3.29	2.86	2.71	5.00	11.43	3.29	3.14	3.64	3.71	3.00	3.14	2.24	1.71
Units required for small children and juveniles	11	9	9	17	31	10	9	15	13	10	11	6.7	7
Units required for the central population 18-64	1	1	1	1	1	1	1	1	1	1	1	1	1
Units required for the elderly	11	10	9	17	48	12	12	9.5	12	10	10	8	4

* The Demand Index is obtained by summing the estimated demand for each age group and dividing by the number of groups (7).

Source: The estimates were made by a group of Latin American specialists in social matters who were participants in the course on "The redistribution of time. An Indicator of Equality", at CEPAL, which was directed by M.A. Durán in Santiago de Chile in May 2008. Each column corresponds to a different specialist; they are identified by a number in order to protect their anonymity.

America and the Caribbean with those from other continents and countries, but it is foreseeable that in future work the Santiago scale may be the scale which will be used as the starting point.

Some of the expert participants already knew the Madrid scale, and therefore there may have been some prior influence. The relative symmetry in the age categories in terms of dependence is verifiable, and this may explain at least partially the tendency to make the weighting between ages symmetrical, with a parallelism between the youngest and the oldest. The expert identified as no. 5 interpreted

TABLE 8.5 (contd.): **Santiago scale. The demand for care in the infant, juvenile, and third age populations in Latin America***

Specialist									Standard Deviation	Median	Mode	Coefficient of variation	Max./min. Ratio	Max./min. Difference
14	15	16	17	18	19	20	21	Mean						
6	6	6	2	5	4	5	4	5.57	3.06	5	5	2.67	8.50	15.00
4	4	3	0.5	3	2	3	3	3.48	1.76	3	3	2.38	20.00	9.50
3	3	1.5	0.5	2	1.5	2	2	2.13	0.73	2	2	0.48	8.00	3.50
1	1	1	1	1	1	1	1	1.00	0.00	1	1	-	1.00	0.00
2	2	1.5	0.5	1.5	2.5	2	1	2.29	1.80	2	2	3.98	20.00	9.50
5	5	2	0.5	2.5	3	4	2	3.98	3.36	4	4	3.62	36.00	17.50
6	6	2	0.5	3	4	5	2.5	5.10	3.87	4	4	2.83	40.00	19.50
3.86	3.86	2.43	0.79	2.57	2.57	3.14	2.21	3.36	1.32	3	2	-1.16		
13	13	11	3	10	7.5	10	9							
1	1	1	1	1	1	1	1							
13	13	5.5	1.5	7	9.5	11	5.5							

*The Demand Index is obtained by summing the estimated demand for each age group and dividing by the number of groups (7).

Source: The estimates were made by a group of Latin American specialists in social matters who were participants in the course on "The redistribution of time. An Indicator of Equality", at CEPAL, which was directed by M.A. Durán in Santiago de Chile in May 2008. Each column corresponds to a different specialist; they are identified by a number in order to protect their anonymity.

the demand as referring both to that directed to households and to external entities (public and private services, NGOs, etc.), while the other experts were referring to households. All included self-administered care, and at least at the beginning they were referring to the care in fact received, although it is possible that some may have taken into account the care necessary and not that received in their estimate.

It is striking that the average in each age category is much higher in the Santiago scale than in the Madrid scale, in spite of the fact

that it was agreed to keep the same weighting (=1) for the central age group as the reference group. As can be seen in Table 8.6, the differences are at their greatest in the outer age groups. The ratio between the two scales is 2.79 for children from 0 to 4 years old, and 2.55 for those older than 80 years of age.

TABLE 8.6: **Proportionality between the Madrid I scale and the Santiago scale**

Age groups	Madrid I scale	Santiago scale	Ratio B/A
0-4 years of age	2.00	5.57	2.79
5-14 years of age	1.50	3.48	2.32
15-17 years of age	1.20	2.13	1.77
18-64 (reference group) 1 unit	1.00	1.00	1.00
65-74 years of age	1.20	2.29	1.90
75-84 years of age	1.70	3.98	2.34
85 years of age and above	2.00	5.10	2.55

Source: Prepared by M.A. Durán.

The *demand index* is the average of the weightings made by each expert for their own country¹⁵², but it cannot be confused with the average in fact assigned to the country, because the central age group is much more numerous than the others, and the distribution by ages is different in each country. Although it is not a real average, this *demand index* gives an approximate idea of the care load as it is seen by each expert: the average is 3.36 units; the mode and the median are 4 units of care. One third of the experts considered that the demand for care for children and young people (per person) is equal to that for care for the elderly. The remainder are distributed equally between those who weight the demand for children or young people higher and those who consider that for the elderly to be higher. The issue is very important, because in Latin America there is a strong process of aging in many countries, and care services for the elderly are poorly developed. According to CEPAL, the

¹⁵² Sum of the scores given by each age group divided into the seven categories.

advances in the coverage of pre-school education (0-5 years old) and the extension of the school day are recent but uneven throughout the region (CEPAL 2009, 46).

From a methodological point of view, it should be pointed out that the weightings are highly heterogeneous. This reflects the different role played by households in each country, but also the need for greater development, spread of information, and decision-making in the definitions of care, as well as more and better research on the use of the time devoted to care.

Conceptually, the major difference between the Madrid (I and II) scales and the Santiago scale is that the former refer to the whole demand for care, wherever it is satisfied, while the latter refers to the demand satisfied free of charge in households, and does not include other forms of care. Regardless of the points awarded by the experts in their meeting in Santiago de Chile, the scale can be revalidated with new empirical research studies based upon Time Use Surveys, both general surveys and monographic surveys on care.

8.1.2.3. *The Granada and Freetown scales*

Table 8.7 illustrates the differences in the intensity of demand for care. It refers to minimum and maximum scores given by an international group of doctoral students at the University of Granada, who had deliberately received no previous information about the Madrid scale or other indicators of dependence. Of the 21 participants, eleven scored the demand for those over the age of 85 years old higher than that for children of less than four years old. Two participants scored them the same, and the remainder (eight participants) gave it a lower score. The result would probably have been quite different if the scale had been applied to a population of retired people. Table 8.7 shows only the minimums and maximums, and discards the other estimates. Just as in the other scales, the differences of perception are at their greatest in respect of the extreme age groups. The minimum scores are more homogeneous than the maximums.

The interesting point about Table 8.7 lies in the fact that it shows the great variability of the estimates, and consequently, the need to provide some empirical support for policies for public substitute care services.

TABLE 8.7: Variations in the perception of the demand for care

	A	B	C	D
	Minimum score	Maximum score	Ratio B/A	Difference B - A
From 0 to 4 years of age	2.0	20.0	10.0	18.0
From 5 to 14 years of age	0.5	10.0	20.0	9.5
From 15 to 64 years of age	1.0	5.0	5.0	4.0
From 65 to 74 years of age	2.0	10.0	5.0	8.0
From 75 to 84 years of age	2.5	13.0	5.2	10.5
85 years of age and above	3.0	20.0	6.7	17.0
Range of variation in the ratio	3.0	4.0		
Range of variation in the difference	2.0	15.0		

Source: Participants in the doctoral course "The situation of women in social health problems". Doctoral Programme. Department of Sociology. University of Granada.

Although demographic factors may be decisive, and information about them may be more accessible than about other factors, the weight of the other economic, cultural, and organisational factors should not be forgotten. Good social organisation can minimise the effect of disabilities, and delay the sequelae of aging, and the reverse is just as true. A frozen war, a poorly resolved epidemic, or bad organisation can cancel out the positive aspects of a young or well-balanced demographic structure. The Freetown scale, developed by Rogero García, incorporates some novel aspects into forecasting care, such as the availability or absence of public services (Roger García 2011)¹⁵³.

The Valencia scale (Table 8.8) is the result of a seminar with doctoral students from that university who had been previously working with the Madrid scale. The variation with respect to the Madrid scale was moderate when they were asked to construct their own scale. The participant identified as "L" modified the estimate for the central group, although it had been proposed to keep this

¹⁵³ This study forms part of the same project that gave rise to this work. It was initially to be published together, but for reasons of length, it was published independently as a working paper.

TABLE 8.8: Valencia scale

Age ranges	Madrid scale	A	B	C	D	E	F	G	H	I	J	K	L	M	N	A	Mean	Mode	max min
1. From 0 to 4 years of age	2.0	2.5	3.0	2.0	2.0	2.0	2.5	2.0	3.0	5.0	2.0	3.0	1.0	3.0	3.0	3.0	2.64	3.0	3.00
2. From 5 to 14 years of age	1.5	2.0	2.0	1.5	1.5	1.5	2.0	1.5	2.0	4.0	1.4	2.0	0.9	2.0	2.0	2.0	1.91	2.0	2.22
3. From 15 to 17 years of age	1.2	1.0	1.5	1.5	1.5	1.5	1.2	1.2	1.5	3.0	1.5	1.0	0.5	1.5	1.5	1.0	1.39	1.5	6.00
4. From 18 to 64 years of age	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	0.3	1.0	1.0	0.0	0.88	1.0	3.33
5. From 65 to 74 years of age	1.2	1.2	1.5	1.5	1.3	1.5	1.5	1.5	1.5	2.0	1.8	2.0	0.5	2.0	1.8	1.0	1.51	1.5	4.00
6. From 75 to 84 years of age	1.7	2.0	2.0	1.9	1.8	1.7	1.7	1.7	2.5	4.0	1.9	3.0	0.7	2.5	2.5	2.0	2.16	2.0	4.29
7. 85 years of age and above	2.0	2.5	4.0	3.0	2.0	2.0	2.0	2.0	3.0	5.0	2.0	4.0	1.0	3.0	3.0	3.0	2.82	3.0	4.00
Care for small children (1) care for the elderly (7)	1	0.8	0.7	1	1.3	1	1.3	1	1	1	1	0.8	1	1	1	1			

Source: M.A. Durán (2000c).

fixed. The resulting average of the estimates, except for this age group, is higher than in the Madrid I scale, and the mode is similar to that of the Madrid II scale. The average is higher for the population from 75 to 84 years old than for children from 5 to 14 years old, and is also greater for those older than 85 of age than for those younger than 5 years old.

8.2. The prediction of the worldwide demand for care

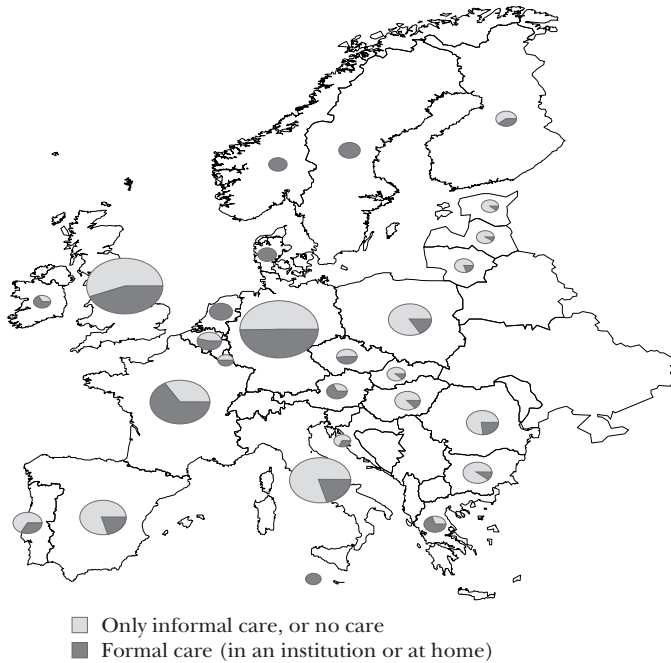
8.2.1. The future demand for care in Europe

Europe is a great region in respect of its economic, political, and technological importance, but not for its demographic contribution to the world population. While it had 547.5 million inhabitants in 1950, it had 732.8 million in 2010, and it is forecast that, in spite of the demographic injection it receives through immigration, it will have fallen to 719.3 million inhabitants by 2050. Between 2010 and 2050, it will lose four million children of less than 4 years of age, and five million children from 5 to 14 years of age. Simultaneously it will gain 35 million persons over the age of 80 years of age. Map 8.1 illustrates the volume of dependent persons and the percentage who receive formal and informal help. The ratio of care to the total population will remain stable, but the ratio of units of care with respect to the population from 15 to 64 years of age will change from 2.1 to 2.8, equivalent to an increase of 33%.

Although the number of children will fall by nine million, it is not likely that the services for this group will fall in proportion; the trend is to transform the demand into a different demand of higher quality, and consequently of greater cost (García Díez 2011).

The great increase in the elderly will give rise to a transformation in family relations and in the public and private care services, which will force a demand for immigrant care workers (Table 8.9). According to the European Social Survey, European women are more worried than men about their income when they reach old age, which directly affects their capacity to acquire from the market the care services which they do not receive from the State. This fear is greater in some countries than others: between 10% and 60% of

MAP 8.1: Volume of dependent persons and percentage who receive formal and informal help. Europe, 2007



Source: Prepared by the author using data from the European Commission (European Commission 2009).

European women express this worry, with the minimum in the Scandinavian countries, and the maximum in Bulgaria, the Ukraine, Poland, Hungary, and Russia. In Spain and Portugal, more than 40% of the population express worries for this reason, but there is no difference between women and men (data for the years 2006-2007) (ESS 2009, 4).

Currently, the overall daily workload is somewhat greater for women according to the Time Use Surveys (Harmonised Eurostat Survey), in spite of the fact that these surveys under-estimate care time. In all European countries except for Norway, the overall workload is greater for women, and is between half an hour and one hour greater than the workload for men. In Spain it is almost one hour, similar to the situation in Estonia, Hungary, or Slovenia (Durán 2010a, 163).

TABLE 8.9: The demand for care by age groups in Europe, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population of 15-64 years old		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Variation	547.3	738.2	719.3	100.0	100.0	100.0	791.9	1,042.2	1,132.3	100.0	100.0	100.0	2.2	2.1	2.8
Population from 0-4 years of age	50.4	39.7	38.2	9.2	5.4	5.3	151.3	119.0	114.7	19.1	11.4	10.1	0.4	0.2	0.3
Population from 5-14 years of age	92.8	74.4	75.9	17.0	10.1	10.6	185.6	148.7	151.8	23.4	14.3	13.4	0.5	0.3	0.4
Population from 15-64 years of age	359.1	5,04.8	411.5	65.6	68.4	57.2	359.1	504.8	411.5	45.3	48.4	36.3	1.0	1.0	1.0
Population from 65-80 years of age	38.9	88.5	126.6	7.1	12.0	17.6	77.8	177.0	253.1	9.8	17.0	22.4	0.2	0.4	0.6
Population of 80 plus years of age	6.0	30.9	67.1	1.1	4.2	9.3	18.1	92.7	201.2	2.3	8.9	17.8	0.1	0.2	0.5
Ratio of care units to total population	1.5	1.6	1.6												

* The weighting used under the terms of the Madrid II scale is as follows: population of 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 = 1; from 65-80 = 2; from 80 plus = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2009).

From the budget point of view, in order to offer the same services in 2050 as are currently offered to people over the age of 80 years old, the budget allocation for these services will have to be multiplied by 2.5 at constant prices, a figure which will in fact be higher because of the slow reduction in the number of potential carers in good health due to the same aging process. The idea that the old should take care of the elderly will become a must for the market and for the State, in the face of the great difficulty in providing them with the necessary services through private companies and public funding. A more detailed examination of the relation between the demographic predictions and the labour market in Europe can be seen in Díaz and Moreno (2010).

8.2.2. The future demand for care in Spain

In Spain the growth in the population between 1950 and 2010 was 64%, and it is expected that this will slow down to 11% by 2050, provided that the economic crisis does not restrict the migratory balance and leave the population reduced to its vegetative balance, in which case growth could be negative.

Predictions of demand for growth are of particular importance because of the urgency for finding alternatives to problems which, as they are posed today, cannot be resolved either by the market or by the households, or by the State. Or, at the very least, they will have to make extraordinary innovations to their organisational system.

In the year 2010, the ratio of units of care with respect to the population between 15 and 64 years of age was 2.1 units per person, a demand which is slightly less than in 1950. However, in 2050, it is forecast that the demand will increase to 3 units per person, almost 50% higher than today. If the trend towards the entry of women into the jobs market continues, which all the surveys point to as a majority held desire expressed by the population, and indispensable if the country is to manage to come close to the styles of production and income of the European Union, potential carers will become scarce. The demand by children is currently low, and only supposes 23% of total demand, but the demand by the old has moved from 11% in 1950 to 25.7% of total demand today, and by 2050 it will absorb 46.9% of the total demand for care. There are no available resources to attend to this demand which is growing so rapidly, and to satisfy it

will require a profound reform of the public services, the tax system, the market, and the forms of social organisation. It will also require rewriting the social contract implicit between men and women, as well as that which ties the young generations and the intermediate and older age groups together by means of rights and obligations.

For the moment, it does not look as if Spanish society is aware of the extent of its demographic transformations (Table 8.10). In the most recent CIS Barometer survey, among the principal roles assigned to the family the most important was “raise and educate children”, which was put in first place by 49.3% of those interviewed. On the other hand, very few indicated as their first choice caring for the sick (5.9% of cases, although it reached 16.9% of citations in second place), or taking care of the old. With such a low birth rate, and such a tendency to aging, and without more public services being developed for care, it will be necessary for there to be a profound change in public opinion before measures are adopted, whether legal, economic, or of any kind whatsoever, to take control of the needs of the population over the medium term (CIS 2010b; Rodríguez 2010, 87 et seqq.).

8.2.3. The future demand for care in Africa

Between 1950 and 2010, the population of Africa has multiplied by four, and it will double again by the year 2050. The ratio of units of care will not vary significantly, but the ratio between units of care and the population between 15 and 64 years of age will suffer a significant change: between 2010 and 2050 it will fall from 2.8 to 2.4, a fall of 15%. The time resource devoted to care which will be freed up with the new demographic structure can be directed to education, employment, leisure, or to any other activity. Over the next few decades, Africa will enjoy a *demographic bonus* because the great increase in the demand for care from the elderly population will not have arrived, and the continent will have an extensive contingent of population in the central, potentially working, age groups.

The success or failure of programmes for social change depend to a large extent on how the objectives are defined and measured, as well as on the starting point and the point of destination. Easterly (2008, 37) and other authors have called attention to the fact that it is unjust and counterproductive to measure Africa by the same

TABLE 8.10: The demand for care by age groups in Spain, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	28.1	46.1	51.4	100.0	100.0	100.0	40.5	65.0	84.1	100.0	100.0	100.0	2.2	2.1	3.1
Population from 0-4 years of age	2.7	2.5	2.5	9.5	5.5	4.9	8.0	7.6	7.5	19.7	11.6	8.9	0.4	0.2	0.3
Population from 5-14 years of age	4.8	4.4	5.0	17.0	9.5	9.8	9.5	8.7	10.0	23.6	13.5	11.9	0.5	0.3	0.4
Population from 15-64 years of age	18.6	31.4	27.1	66.3	68.1	52.7	18.6	30.8	27.1	46.0	47.3	32.2	1.0	1.0	1.0
Population from 65-80 years of age	1.7	5.5	10.8	6.2	12.0	21.0	3.5	11.1	21.6	8.6	17.1	25.6	0.2	0.4	0.8
Population of 80 plus years of age	0.3	2.3	6.0	1.0	4.9	11.6	0.9	6.8	17.9	2.1	10.5	21.3	0.0	0.2	0.7
Ratio of care units to total population	1.4	1.4	1.6												

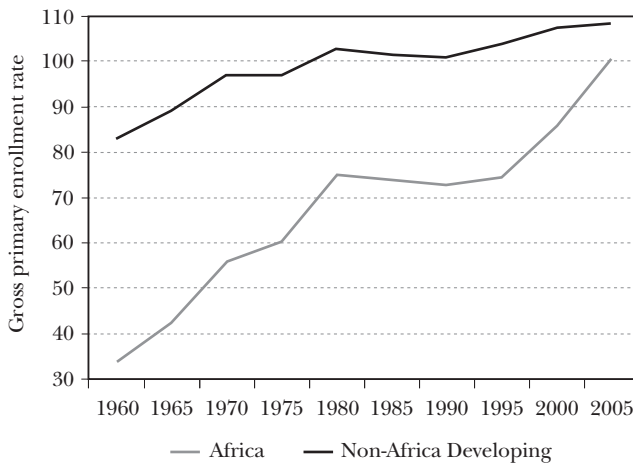
* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; of 80 years from age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

criteria as other regions in relation to the millennium objectives. Foreign aid to developing countries is very much on the way to achieving seven of these objectives by the year 2015, and therefore the programmes are being monitored closely by the United Nations, the World Bank, the International Monetary Fund, and other bilateral and international agencies. There is general agreement that Sub-Saharan Africa will not achieve any of the objectives, but this apparent failure conceals efforts and successes which are deserving of recognition. The indicators employed to measure improvement in conditions of poverty are focussed on measuring the proportion of people who cross over the set threshold, but not those who get close to the threshold but do not manage to cross it. For example, reducing the population in poverty from 35% to 20%, in comparison with some other place where it has been reduced from 10% to 5% can appear more favourable to the first country if what is being measured is the amount reduced (15% in the first case) than the proportional reduction (5% or 50% in the second case, depending on the point of view taken). In other objectives, such as achieving universal education by 2015, Africa has to cover much more ground given that its starting point was much further away. In fact, Africa is achieving a velocity of change in this matter which experts calculate to be much faster than that obtained by the western countries in the period of their own development.

Esterly's criticisms of the methodology are pertinent, but other measurements of development would have to be proposed and agreed. It is also indispensable to analyse the changes which have to occur in the organisation of households so that the children can in fact register and attend their schools, and the question as to whom the cost of introducing these changes in everyday life will fall on over the short term (Graph 8.1).

The predictions of the World Population Prospect assume that the probable scenario will be a continuing annual emigration of close to 500,000 people to other continents, in addition to those who will move between African countries. The migrants belong almost exclusively to the population of the central ages, which reduces the number of potential carers and transfers the care load to those who remain behind in the household of origin (Table 8.11). Emigration rates vary remarkably between regions, and are maxi-

GRAPH 8.1: Primary school attendance rates in Africa and other developing regions



Source: World Development, no. 37, 2009, p. 29.

num in the region of North Africa (-11% in 2010) (Table 8.12). A more detailed account of the social implications of the change in the demographic structure of Africa can be found in Domínguez Serrano (2010)¹⁵⁴.

As a working hypothesis, Domínguez Serrano considers that households contribute 85% of the care consumed by children, 70% of that consumed by the population from 15 to 65 years old, and 95% of that consumed by people over the age of 65 years old.

8.2.4. The future demand for care in Asia

The continent of Asia is the great demographic powerhouse of the world. Between 1950 and 2010, the population almost tripled, and over the coming four decades it will still grow by 23%. Applied to its enormous starting point, this means an increase of more than one thousand million people, equivalent to more than twice the current population of the United States and Canada.

¹⁵⁴ This study forms part of the same project that gave rise to this work. It was initially to be published together, but for reasons of length, it was published independently as a working paper.

TABLE 8.11: The demand for care by age groups in Africa, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	229.9	1,022.2	2,191.6	100.0	100.0	100.0	372.9	1,629.6	3,263.0	100.0	100.0	100.0	2.9	2.8	2.4
Population from 0-4 years of age	39.2	155.3	233.7	17.1	15.2	10.7	117.6	465.9	701.0	31.5	28.6	21.5	0.9	0.8	0.5
Population from 5-14 years of age	56.5	256.4	437.4	24.6	25.1	20.0	113.0	512.9	874.9	30.3	31.5	26.8	0.9	0.9	0.6
Population from 15-64 years of age	126.7	574.5	1,376.3	55.0	56.2	62.8	126.7	574.5	1,376.3	34.0	35.3	42.2	1.0	1.0	1.0
Population from 65-80 years of age	6.9	31.6	121.7	3.3	3.1	5.6	13.8	63.1	243.4	3.7	3.9	7.5	0.1	0.1	0.2
Population of 80 plus years of age	0.6	4.4	22.5	0.3	0.4	1.0	1.9	13.2	67.4	0.5	0.8	2.1	0.0	0.0	0.0
Ratio of care units to total population	1.6	1.6	1.5												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.

Source: Prepared by M.A. Durán using data from the United Nations (2010).

TABLE 8.12: Forecast migration in Africa

Period	Africa (in thousands)	Rate* (in thousands)	East Africa (in thousands)	Rate* (in thousands)	Central Africa (in thousands)	Rate* (in thousands)	North Africa (in thousands)	Rate* (in thousands)	South Africa (in thousands)	Rate* (in thousands)	West Africa (in thousands)	Rate* (in thousands)
2010-2015	-537	-0.5	-75	-0.2	-30	-0.2	-202	-0.9	-63	-1.1	-167	-0.5
2015-2020	-455	-0.4	-48	-0.1	-33	-0.2	-137	-0.6	-63	-1.0	-173	-0.5
2020-2025	-459	-0.3	-108	-0.2	-22	-0.1	-161	-0.6	7	0.1	-175	-0.4
2025-2030	-442	-0.3	-108	-0.2	-22	-0.1	-145	-0.5	7	0.1	-175	-0.4
2030-2035	-439	-0.3	-108	-0.2	-22	-0.1	-141	-0.5	6	0.1	-174	-0.3
2035-2040	-439	-0.2	-108	-0.2	-22	-0.1	-141	-0.5	6	0.1	-174	-0.3
2040-2045	-439	-0.2	-108	-0.2	-22	-0.1	-141	-0.5	6	0.1	-174	-0.3
2045-2050	-440	-0.2	-108	-0.1	-22	-0.1	-141	-0.4	5	0.1	-174	-0.2

* per million
Source: Prepared by M.A. Durán using data from the United Nations (2010).

Over this period, the average age of the population has changed from 22.3 years old to 29.0 years old, and by the year 2050 it will have reached 40.0 years old. The general dependence ratio will fall progressively until the year 2030, and then it will start to grow. The ratio of units of care will not suffer major change; it was 1.5 at the beginning of the period, is currently 1.4, and in 2050 it will be at 1.5 once again, but the weight which will fall on the population between 15 and 64 years old will see greater change: between 1950 and 2050 it fell from 2.6 to 2.1, equivalent to a “bonus” of 24%. However, by 2050 it will have lost a large part of that bonus, and the ratio will be 2.3.

Overall, Asia is an emigrant continent, and it is forecast that it will lose more than 1.25 million people every year and that this will accumulate until 2050. Emigration rates are higher in the south and in the centre than in the remaining regions, and for the most part consist of people in the central ages, which means that the proportion of potential carers will fall (Table 8.13).

TABLE 8.13: Forecast migration in Asia, 2010-2050

Period	Asia (in thousands)	Rate* (in thousands)	East (in thousands)	Rate* (in thousands)	South (in thousands)	Rate* (in thousands)	West (in thousands)	Rate* (in thousands)
2010-2015	-1,172	-0.3	-240	-0.2	-628	-0.4	250	1.0
2015-2020	-1,232	-0.3	-270	-0.2	-703	-0.4	196	0.7
2020-2025	-1,192	-0.3	-259	-0.2	-668	-0.3	164	0.6
2025-2030	-1,187	-0.2	-245	-0.2	-644	-0.3	86	0.3
2030-2035	-1,126	-0.2	-244	-0.2	-619	-0.3	86	0.3
2035-2040	-1,073	-0.2	-246	-0.2	-597	-0.3	88	0.3
2040-2045	-1,024	-0.2	-245	-0.2	-578	-0.2	89	0.2
2045-2050	-979	-0.2	-246	-0.2	-559	-0.2	91	0.2

* per million

Source: Prepared by M.A. Durán using data from the United Nations (2010).

In 1950, the ratio between men and women on the continent of Asia was 105.4 men per 100 women, while overall in the world it was 99.8. Currently, it is 104.8, and around the world is it 101.7. By the year 2050, it is expected that it will be 102.4 in Asia and 100.6 in the world population as a whole (Table 8.14).

TABLE 8.14: The demand for care by age groups in Asia, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	1,403.4	4,164.3	5,142.2	100.0	100.0	100.0	2,178.4	5,930.7	7,489.0	100.0	100.0	100.0	2.6	2.1	2.3
Population from 0-4 years of age	200.3	360.4	292.9	14.3	8.7	5.7	601.0	1,081.2	878.7	27.6	18.2	11.7	0.7	0.4	0.3
Population from 5-14 years of age	312.0	719.3	606.2	22.2	17.3	11.8	624.0	1,438.7	1,212.4	28.6	24.3	16.2	0.7	0.5	0.4
Population from 15-64 years of age	833.9	2,805.4	3,320.4	59.4	67.4	64.6	833.9	2,805.4	3,320.4	38.3	47.3	44.3	1.0	1.0	1.0
Population from 65-80 years of age	51.9	231.9	690.6	3.7	5.6	13.4	103.8	463.7	1,381.2	4.8	7.8	18.4	0.1	0.2	0.4
Population of 80 plus years of age	5.2	47.2	232.1	0.4	1.1	4.5	15.7	141.6	696.4	0.7	2.4	9.3	0.0	0.1	0.2
Ratio of care units to total population	1.5	1.4	1.5												

*The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

The demand for care by the infant population will fall considerably over the next four decades, while the population of advanced age will quadruple in absolute terms, and more than double in proportion to total care.

Regions and countries which are very varied are classified together under the common denominator of Asia, with the poorest and the richest in the world among them, with very varied demographic structures and modes of organisation. The demand for care forecast in Japan, China, and India will be seen in greater detail below.

8.2.5. The future demand for care in Japan

The most remarkable point about the demographics of Japan is its aging and the predictions of a falling population over the coming decades. According to the projections shown in Table 8.15, by the year 2050 Japan will have fallen from the existing 126.5 million inhabitants to little more than 108.5 million; but other projections are even more dramatic, with the Population Reference Bureau of 2010 putting the population projected for that year at 95 million, which is equivalent to a loss of population of 32 million Japanese, or almost a quarter, as a result of natural aging and the fall in the birth rate (PRB 2010). Although the most dramatic point is the death or disappearance of the demographic asset, what it is most important to analyse from the perspective of non-remunerated work is the demand for care of the population during the period prior to their death.

At the beginning of the period under analysis, Japan already had a low dependence ratio, which reached its minimum level in 1970 because of the reduction of infant dependence. The dependence of the population from 0 to 14 years old has stabilised since the year 2000, at about 20 children for every 100 adults of central ages. On the other hand, the dependence of those over the age of 65 years old grew without ceasing and it is estimated that it will continue to grow until the end of the period under consideration.

Throughout the century under consideration, the ratio between men and women is lower than one hundred; in 1950 it was 96.0; in 2001, it was 95.0; and in 2050 it will be 93.8.

In 1950, for every adult of central age 2.59 units of care had to be produced; one for themselves, 1.41 for children, and a small re-

TABLE 8.15: The demand for care by age groups in Japan, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	82.2	126.5	108.5	100.0	100.0	100.0	126.7	185.6	182.4	100.0	100.0	100.0	2.6	2.3	3.3
Population from 0-4 years of age	11.0	5.4	4.8	13.4	4.3	4.4	33.0	16.3	14.4	26.0	8.8	7.9	0.7	0.2	0.3
Population from 5-14 years of age	18.1	11.5	9.7	22.0	9.1	8.9	36.2	22.9	19.4	28.5	12.4	10.6	0.7	0.5	0.3
Population from 15-64 years of age	49.1	80.9	55.4	59.7	64.0	51.1	49.1	80.9	55.4	38.7	43.6	30.4	1.0	1.0	1.0
Population from 65-80 years of age	3.7	20.7	22.7	4.5	16.4	20.9	7.4	41.4	45.4	5.8	22.3	24.9	0.2	0.5	0.8
Population of 80 plus years of age	0.4	8.0	15.9	0.4	6.3	14.6	1.1	24.0	47.7	0.9	12.9	26.2	0.0	0.3	0.9
Ratio of care units to total population	1.5	1.5	1.7												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

mainder for the elderly. Today, the demand for care is 2.28 per adult, a fall of 12% in comparison with the beginning of the period, which is materialised as a greater availability of resources for other activities (Table 8.15). The change in the internal composition of the demand has been extraordinary: while the demand from children has fallen (0.7 units per adult of central age), that from the elderly has multiplied by four. What is particularly striking is the demand for care generated by the octogenarians.

By the year 2050, the demographic bonus in Japan will melt away. The demand for care will grow by almost 43% with respect to that of today: the demand from children will remain virtually stable.

With such a powerful demographic transformation, the forms of family, social, economic, and political organisation will have to change. Among other options, the Japanese will have to decide whether the resources which are indispensable for attending to the aging population will be taken directly from households or from the State. They will also have to decide whether the distribution of care is produced in an egalitarian fashion between the genders or whether it is made to fall almost exclusively on the women.

8.2.6. The future demand for care in China

Between 1950 and 2010, the population of China multiplied by 2.4 times. In comparative terms with other countries it is not one of the highest, but this is equivalent to an increase of more than 800 million people. The development of the age structure of the population currently places China in a very favourable situation, because the demand of the infant and school-age population has fallen sharply, while the proportion of people of a potentially working age has increased. While each adult of central age had to produce 2.45 units of care in 1950, they only had to produce 1.89 units in 2010. This is equivalent to a reduction of 23%, which makes it possible to transfer more productive capacity to the labour market, or to devote time to the activities of training, participation, leisure, or the refinement of daily life. The structure of the demand for care has changed considerably: Every adult only has to produce 0.27 units of care for children between the ages of 0 and 4 years old, and 0.37 units for children between the ages of 5 and 14 years old. The demand for care from the elderly population continues to be very low, al-

though proportionately demand from octogenarians has multiplied by six.

Men have a higher mortality, but women suffer more morbidity, which makes them more dependent in their final years of life. These differences are explained not only by genetic and biological issues, but different exposures to risk and different manners of responding to them also contribute (Zuehlke 2009). Living in rural areas is also a social condition which has an impact upon mortality, because of the greater difficulty in access to good jobs, accommodation, and health services, as well as precarious availability of good roads, telegraph, telephone, electricity, and living with the following generation¹⁵⁵.

By the year 2050, the situation will change drastically, and China will lose the demographic bonus which it currently enjoys, to return to levels of demand for care which will be the same as in 1950. This will not come from children, as the demand for childcare per adult will remain stable, but from persons of advanced age. The demand from people between the ages of 65 to 80 years old will almost triple, and the demand from octogenarians will multiply by four. Each adult of central age will have to produce almost one unit of care (that is, the same as for themselves), in order to satisfy the needs of the elderly population, a sizeable effort of which the octogenarians will consume one third. Moreover, the proportion of women among the potential carers is lower than in other countries; in 1950, the ratio between men and women was 107.5, in 2010 it was 108.0, and in 2050 it will be 105.3. In other words, if policies for the care of dependents are made to fall on households, there will be eight women short for every hundred men and the other ninety-two will have to take on the proportional part of what would have been the responsibility of those eight women.

The care of the elderly will be one of the principal social challenges in China over the coming decades, because other social changes have been added to the demographic changes, and that are in fact reducing the number of potential carers in the place where those needing the care will be living (Table 8.16). Also, a further challenge will be policies for the creation of opinion in respect of

¹⁵⁵ Note on Kaneda and other authors in PRB (2008b).

TABLE 8.16: The demand for care by age groups in China, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	550.8	1,341.3	1,295.6	100.0	100.0	100.0	841.7	1,811.9	1,956.1	100.0	100.0	100.0	2.5	1.9	2.5
Population from 0-4 years of age	76.1	81.6	56.6	13.8	6.1	4.4	228.4	244.8	169.7	27.1	13.5	8.7	0.7	0.3	0.2
Population from 5-14 years of age	112.2	179.4	117.8	20.4	13.4	9.1	224.5	358.7	235.6	26.7	19.8	12.0	0.7	0.4	0.3
Population from 15-64 years of age	337.6	970.5	790.0	61.3	72.4	61.0	337.6	970.5	790.0	40.1	53.6	40.4	1.0	1.0	1.0
Population from 65-80 years of age	23.3	91.6	232.9	4.2	6.8	18.0	46.6	183.3	465.7	5.5	10.0	23.8	0.1	0.2	0.6
Population of 80 plus years of age	1.6	18.2	98.3	0.3	1.4	7.6	4.7	54.6	295.0	0.6	3.1	15.1	0.0	0.1	0.4
Ratio of care units to total population	1.5	1.4	1.5												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.

Source: Prepared by M.A. Durán using data from the United Nations (2010).

individual and collective responsibility toward the elderly population. Furthermore, the structure of public and family budgets will have to change, and huge investments in social and medical health-care infrastructure will be necessary.

8.2.7. The future demand for care in India

In 1950, the population of India was 371.9 million people, and in 2010 it was 1,224.6 million. In absolute terms, it has multiplied by 3.29, and has grown by 852.7 million people, a figure which is larger than the entire current population of Europe and twice that of South America. At the beginning of the period, each inhabitant of central age had to produce 2.62 units of care, and they needed to invest more care in attending to children (1.5 units) than in looking after themselves. On the other hand, the effort devoted to the production of care for the elderly was very small. In 2010 the total demand for care is 2.28 units of care for every person of central age, and it continues to comprise basically demand from the infant population. This reduction of 12% in the total demand allows a modest transfer of human resources to the market, and to other activities such as education, social and political participation, rest, and leisure.

The general ratio of dependence (the ratio between the population of those of 0-14 years of age plus those older than 65 and the population of those of 15-65 years of age) reached its maximum point in India in 1965, with a ratio of 82. That year a progressive decline commenced and will reach its minimum in 2040 with a ratio of only 44 points. From that year on, it will begin to increase again as a consequence of the rapid increase in the elderly population.

The demand for care is following a rather different course from the general dependence ratio, because it is weighted by the age composition of the dependent population. By 2050, the demand for care ratio in the population of central age will be 2.07, a reduction of 10% in comparison with today's figure. This is not an intense descent overall, but the internal composition of the demand will change. The demand for care from children from 0 to 4 years of age will reduce by half, and something similar will occur with the demand from children from 5 to 14 years old. On the other hand, the demand for care from those over the age of 65 years old will almost triple, and

that from the octogenarians will quadruple, exerting heavy pressure on family budgets as well as the State budget (Table 8.17).

The ratio between men and women in India was 108.0 in 1950, and it is currently 106.8. This is due to the greater longevity of women, because the ratio at birth in 2010 was 108, and it is expected to be the same for 2050. At the beginning of the period under study, life expectancy at birth was 38.7 years for men and 37.1 years for women, a year and a half less. Currently (2010-2015) the trend has inverted, and life expectancy is three years longer for women (67.6) than for men (64.4), a trend which will be accentuated in the future.

8.2.8. The future demand for care in Latin America and the Caribbean

As has already been indicated, the situation of non-remunerated work in Latin America and the Caribbean occupied an important place in the research project which gave rise to this work, together with forecasting future demand for care. Only a brief overview is offered under this heading, because the monographic study has been published independently (Durán and Milosavljevic 2011).

Research on non-remunerated work has hit the political agenda recently in Latin America, and has hit it hard. The most visible result of this has been the preparation of new statistical instruments to make it more easily understood both by means of incorporating modules in the Household Surveys, the Income and Expenses Surveys, and the Living Conditions Surveys, and by means of the preparation and implementation of Time Use Surveys. Meetings, debates, and seminars have also been held between statisticians and other experts and those responsible for public policies. The official closing document at the X Regional Conference on Women in Latin America and the Caribbean, held in Quito in 2007, agreed to develop periodic instruments for the measurement of non-remunerated work in order to include it in the System of National Accounts. Milosavljevic has monitored 19 Time Use Surveys in the region between 2001 and 2009, and several more in process of execution (Durán and Milosavljevic 2010).

From the point of view of changes in the future demand for care arising from demographic causes, the change in the age composi-

TABLE 8.17: The demand for care by age groups in India, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	371.9	1,224.6	1,692.0	100.0	100.0	100.0	577.8	1,795.6	2,388.8	100.0	100.0	100.0	2.6	2.3	2.1
Population from 0-4 years of age	53.5	128.0	103.7	14.4	10.5	6.1	160.5	383.9	311.0	27.8	21.4	13.0	0.7	0.5	0.3
Population from 5-14 years of age	85.9	246.6	217.6	23.1	20.1	12.9	171.7	493.2	453.3	29.7	27.5	18.2	0.8	0.6	0.4
Population from 15-64 years of age	220.8	789.8	1,143.1	59.4	64.5	67.6	220.8	789.8	1,143.1	38.2	44.0	47.9	1.0	1.0	1.0
Population from 65-80 years of age	10.3	52.1	183.4	2.8	4.3	10.8	20.6	104.2	366.9	3.6	5.8	15.4	0.1	0.1	0.3
Population of 80 plus years of age	1.3	8.2	44.2	0.4	0.7	2.6	4.0	24.5	132.7	0.7	1.4	5.6	0.0	0.0	0.1
Ratio of care units to total population	1.6	1.5	1.4												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

tion and the migratory pressure should be emphasised. Migration is stronger in the countries in Central America and the Caribbean, where it even reaches annual rates of more than 3%, than in South America. The accumulation of generations with a heavy incidence of migration leaves unpopulated segments which may, over the medium term, lead to a scarcity of carers. Because of the fall in birth-rate and the increase in longevity, a change in the composition of the demand and in the distribution of the care load among potential carers can be expected. The high incidence of single-parent families is also an important factor in the organisation of care.

According to the WHO (2009) the average healthy life span in Latin America is 64 years: men are likely to live a further eight years in poor health and women ten years. The demand for care in the region for the period from 1950 to 2050 can be seen in Table 8.18. Between 1950 and 2010, the region has enjoyed a demographic bonus and it has been possible to devote the extra time to other alternative activities instead of care. From the year 2010, the trend will revert, and the demand for care will increase: while every adult now has to produce 2.2 units of care (one for themselves and 1.2 for others), in 2050 they will have to produce 2.3. In 1950, only 0.8% of the units of care were devoted to those over the age of 80 years old, but nowadays this is already 3%, and by the year 2050 it will be 10.2%, a fact which necessitates a substantial change in the forecasting models.

A more detailed treatment of demand forecasting and of the possible distribution scenarios can be seen in the cited work by Durán and Milosavljevic, which includes disaggregated information on Argentina, Brazil, Costa Rica, Cuba, Ecuador, Mexico, the Dominican Republic and Uruguay, as well as the regional information.

8.2.9. The future demand for care in the United States and Canada

The ratio between men and women in North America in the year 2010 was 97.5. The minimum point was reached in 1980 (96.4) after a continuing decline since the virtual equality which prevailed in 1950 (100.1), and it is expected that it will reach equality once again in 2050. This will be due to the greater longevity of women, because the ratio at birth remains stable at around 105.

TABLE 8.18: The demand for care by age groups in Latin America and the Caribbean, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	167.4	590.1	751.0	100.0	100.0	100.0	268.1	857.6	1,107.0	100.0	100.0	100.0	2.8	2.2	2.3
Population from 0-4 years of age	26.9	53.8	41.9	16.1	9.1	5.6	80.6	161.5	125.8	30.1	18.8	11.4	0.9	0.4	0.3
Population from 5-14 years of age	40.4	110.6	87.3	24.2	18.7	11.6	80.8	221.3	174.6	30.2	25.8	15.8	0.9	0.6	0.4
Population from 15-64 years of age	94.2	385.0	478.3	56.3	65.2	63.7	94.2	385.0	478.3	35.1	44.9	43.2	1.0	1.0	1.0
Population from 65-80 years of age	5.2	32.1	102.0	3.1	5.4	13.6	10.3	64.2	204.0	3.8	7.5	18.4	0.1	0.2	0.4
Population of 80 plus years of age	0.7	8.5	41.4	0.4	1.4	5.5	2.1	25.6	124.3	0.8	3.0	11.2	0.0	0.1	0.3
Ratio of care units to total population	1.6	1.5	1.6												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

Life expectancy at birth was already almost six years greater for women than for men in 1950 (71.9 *vs.* 66.1), and at the present moment this has reduced to three years, and by the year 2050 it will once again have increased to five years (86.0 *vs.* 81.1).

Currently, there are twice as many women as men (8.5 million *vs.* 4.8 million) among the group of those over the age of eighty years old, which is the group which requires most care because of their advanced age. Among the centenarians, there are six times as many women as men. In terms of potential carers, these figures highlight the difficulty women face in having family carers free of charge during the period when they are most in need of them.

North America receives potential working population from the rest of the world (a rate of 3.6 ‰), which improves the availability of potential carer units (Table 8.19). A considerable number of the immigrants are employed in direct care services, and in the complementary services of cleaning, food, and health.

TABLE 8.19: **Forecast migration in North America**

Period	People (in thousands per year)	Rate (per thousand population)
2010-2015	1,192	3.4
2015-2020	1,138	3.1
2020-2025	1,092	2.9
2025-2030	1,089	2.8
2030-2035	1,089	2.7
2035-2040	1,089	2.6
2040-2045	1,086	2.5
2045-2050	1,083	2.5

Source: Prepared by M.A. Durán using data from the United Nations (2010).

As can be seen in Table 8.20, the population in North America has doubled between 1950 and 2010, and will still grow by another 30% between today and 2050. Over the next four decades the demand for units of care will grow by 24%, and will be redistributed internally. The proportion of the demand originating from children with respect to the total demand will fall moderately, while demand

TABLE 8.20: The demand for care by age groups in America, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	171.6	344.5	446.9	100.0	100.0	100.0	253.2	494.5	690.0	100.0	100.0	100.0	2.3	2.1	2.6
Population from 0-4 years of age	18.9	23.5	27.9	11.0	6.8	6.2	56.6	70.6	83.6	22.4	14.3	12.1	0.5	0.3	0.3
Population from 5-14 years of age	27.8	44.4	55.0	16.2	12.9	12.3	55.6	88.8	110.1	22.0	18.0	15.9	0.5	0.4	0.4
Population from 15-64 years of age	110.8	231.3	267.5	64.6	67.1	59.9	110.8	231.3	267.5	43.8	46.8	38.8	1.0	1.0	1.0
Population from 65-80 years of age	12.2	32.2	60.5	7.1	9.3	13.5	24.3	64.4	121.1	9.6	13.0	17.5	0.2	0.3	0.5
Population of 80 plus years of age	2.0	13.2	35.9	1.1	3.8	8.0	5.9	39.5	107.7	2.3	8.0	15.6	0.1	0.2	0.4
Ratio of care units to total population	1.5	1.4	1.5												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

from octogenarians will double. While North America has enjoyed a demographic bonus which has allowed it to transfer resources from households to employment or to other activities between 1950 and 2010, by the year 2050 the corresponding care ratio in respect of the population from 15 to 64 years old will once again be higher than it was a century before as a result of the pressure from the elderly population.

8.2.10. The future demand for care in Oceania

After tripling between 1950 and 2010, the population of Oceania still has sufficient vitality to continue growing, although at a less intense rate. It has gained a demographic bonus of 10%, but by the year 2050 the care load on the population of central age will be similar to that of a century before (Table 8.21). At the present time, the demand for care arising from children is still three times higher than that from the elderly population, but by the year 2050 they will have become level.

Overall, Oceania is and will be until 2050 a continent that receives immigrants (a rate of 4.0 in 2010-2015), concentrated in Australia and New Zealand (a rate of 5.9), but emigration predominates in the undeveloped areas (Melanesia, Micronesia, and Polynesia), where it reaches a negative rate of 7.0%.

8.2.11. Variations in the future demand for care in the more developed and the less developed countries

The population of the developed regions can purchase care services at market prices, but the population of the undeveloped regions cannot do so, with the exception of their financial elites. As has already been seen, a good part of the population of the developed countries cannot do so either when they most need it, especially for the care of the elderly and the sick.

Between 1950 and 2010, the population of the economically most developed regions increased by 52%, while that of the least developed regions grew by 330%. By the year 2050, the former will barely have increased their population by 6%, while the latter will have grown by 40%. At least in demographic terms, over the past half century the relative weight of the developed regions in the world population has shrunk, while that of the undeveloped regions has expanded.

TABLE 8.21: The demand for care by age groups in Oceania, 1950, 2010, 2050

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Total Population	12.7	36.6	55.2	100.0	100.0	100.0	19.1	53.4	83.9	100.0	100.0	100.0	2.4	2.2	2.5
Population from 0-4 years of age	1.5	3.1	3.8	12.1	8.4	6.9	4.6	9.2	11.4	24.2	17.3	13.6	0.6	0.4	0.3
Population from 5-14 years of age	2.3	5.7	7.5	17.8	15.6	13.5	4.5	11.4	15.0	23.6	21.4	17.8	0.6	0.5	0.4
Population from 15-64 years of age	8.0	23.9	33.8	62.8	65.3	61.2	8.0	23.9	33.8	41.7	44.7	40.3	1.0	1.0	1.0
Population from 65-80 years of age	0.8	2.9	6.7	6.3	7.8	12.1	1.6	5.7	13.4	8.4	10.7	15.9	0.2	0.2	0.4
Population of 80 plus years of age	0.1	1.0	3.5	1.0	2.8	6.3	0.4	3.1	10.4	2.1	5.8	12.4	0.0	0.1	0.3
Ratio of care units to total population	1.5	1.5	1.5												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

In terms of the internal composition of the demand for care, the proportion of care devoted to the potentially working population (47.5%) and that devoted to the rest of the population in the developed societies have at the present moment become almost equal. With respect to dependents by age, approximately half of the demand stems from children (27%) and the other half from the elderly (25%).

In the underdeveloped regions, the demand which originates in the potentially working population is not very different from that of the developed regions (45% of the total), but it is concentrated almost entirely in children, who absorb a proportion of care (47%) which is higher than that of the population in the central ages, and the demand which stems from the elderly is very limited (8.6%).

Within four decades, in the developed regions the demand originating in the potentially working population will reduce to 37.4% of the total, equivalent to a fall of 22%. The demand from children will fall, but that from the elderly will increase by 52%. If the potentially working population is the population which controls the economic resources deriving from their participation in the market, will it share those resources with the generations of a more advanced age? The care load, if this term is understood to mean the ratio between the units of care required and the population between 15 and 64 years of age, will go from 2.1 units per person to 2.7; or, in other words, if every individual in the central ages in 2010 has to devote one unit of care to themselves, and 1.1 to other persons, in 2050 they will have to produce 1.7 units for other people, and that will require an increase of 55% in the effort devoted to caring for others. Of the 1.7 units of care, only 0.7 will be for the following generations (the children), while 1.1, which is more than they will devote to caring for themselves, will be for attending to the needs of the preceding generation.

In the economically less developed regions there will be no changes in the demand for care which falls to the population of central age, and in 2050 it will be the same as in 2010 (2.3 care units). Nevertheless, the internal structure will change: infant demand will fall to approximately half, and that of the elderly will grow by a factor of four.

Within the less developed regions, the less developed countries will exhibit the extreme trends of their own regions. Demographic growth has been more intense since 1950 (it has quadrupled), and it will continue to be very intense over the coming decades (it will almost double). The change in the internal composition of the demand for care has been spectacular. The demand from children from 0 to 4 years old generated 31% of total demand in 1950, at the present time it is only 28%, and by 2050 it is forecast that it will only be 21%. Simultaneously, the demand from the elderly will grow by a factor of ten over the century, and that from octogenarians will be 36 times higher than it was at the beginning of the period under consideration.

The care load which falls on each person of potentially working age, which was 2.9 units of care in the year 1950, has already fallen to 2.8; by the year 2050, it is forecast that it will be 2.3 units, a figure which is only inferior to that which will have to satisfy each citizen in the central age group in the most developed regions. In this respect, the poorest and the richest countries will become closer, although this will not be in the resources necessary to cope with the care. Childcare will continue to require more care than that of the population of central age; and although the care for the elderly population is already quite visible in the distribution it will still be light in terms of the load which will fall on the adults of potentially working age.

The resources freed up for care do not have the same significance in countries which have already covered the necessary minima for the population as they do in countries which have still not achieved them. For this reason, although there may have occurred an enormous descent in the dedication to care required, which can be appreciated in Table 8.22, there will probably not occur a proportional transfer back to employment, but principally to education and towards a more intensive dedication to the care in which they are currently short.

8.3. The unsustainability of the traditional models of distribution of the care load

Models of care only become consolidated when they satisfactorily respond to the demographic, economic, and social conditions of a

TABLE 8.22: The demand for care in 1950, 2010, 2050, by levels of development

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
More developed regions															
Total population	811.2	1,235.9	1,311.7	100.0	100.0	100.0	1,186.8	1,760.4	2,062.3	100.0	100.0	100.0	2.3	2.1	2.7
From 0-4 years of age	81.4	70.4	73.2	10.0	5.7	5.6	244.3	211.2	219.5	20.6	12.0	10.6	0.5	0.3	0.3
From 5-14 years of age	140.3	133.5	145.0	17.3	10.8	11.1	280.6	267.1	290.0	23.6	15.2	14.1	0.5	0.3	0.4
From 15-64 years of age	525.5	834.9	756.3	64.8	67.6	57.7	525.5	834.9	756.3	44.3	47.4	36.7	1.0	1.0	1.0
From 65-80 years of age	55.5	144.0	215.2	6.8	11.6	16.4	111.0	288.0	430.3	9.4	16.4	20.9	0.2	0.3	0.6
Of 80 plus years of age	8.5	53.1	122.1	1.0	4.3	9.3	25.4	159.2	366.2	2.1	9.0	17.8	0.0	0.2	0.5
Ratio of care units to total	1.5	1.4	1.6												
Less developed regions															
Total population	1,721.0	5,660.0	7,994.4	100.0	100.0	100.0	2,696.9	8,247.7	11,703.0	100.0	100.0	100.0	2.7	2.2	2.3
From 0-4 years of age	255.8	565.4	565.2	14.9	10.0	7.1	767.5	1,696.3	1,695.7	28.5	20.6	14.5	0.8	0.5	0.3
From 5-14 years of age	391.5	1,077.3	1,124.3	22.7	19.0	14.1	782.9	2,154.6	2,248.7	29.0	26.1	19.2	0.8	0.6	0.4
From 15-64 years of age	1,007.2	3,689.9	5,131.5	58.5	65.2	64.2	1,007.2	3,689.9	5,131.5	37.3	44.7	43.8	1.0	1.0	1.0
From 65-80 years of age	60.3	275.1	892.9	3.5	4.9	11.2	120.6	550.3	1,785.9	4.5	6.7	15.3	0.1	0.1	0.3
Of 80 plus years of age	6.2	52.2	280.4	0.4	0.9	3.5	18.6	156.6	841.2	0.7	1.9	7.2	0.0	0.0	0.2
Ratio of care units to total	1.6	1.5	1.5												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

TABLE 8.22 (cont.): **The demand for care in 1950, 2010, 2050, by levels of development**

	Population (in millions)			Population (in percentage terms)			Care units* (in millions)			Care units (in percentage terms)			Ratio of care units / Population from 15-64 years of age		
	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050	1950	2010	2050
Less developed regions															
Total population	196.1	832.3	1,726.5	100.0	100.0	100.0	315.9	1,317.2	2,545.7	100.0	100.0	100.0	2.9	2.8	2.3
From 0-4 years of age	32.9	122.5	174.8	16.6	14.8	9.1	98.7	367.6	524.4	31.2	27.9	20.6	0.9	0.8	0.5
From 5-14 years of age	48.2	211.5	329.5	24.4	25.1	17.9	96.5	423.0	658.9	30.5	32.1	25.9	0.9	0.9	0.6
From 15-64 years of age	108.5	470.0	1,100.6	55.9	56.8	65.6	108.5	470.0	1,100.6	34.4	35.7	43.2	1.0	1.0	1.0
From 65-80 years of age	5.8	24.9	103.0	2.8	2.9	6.3	11.6	49.8	206.0	3.7	3.8	8.1	0.1	0.1	0.2
Of 80 plus years of age	0.6	3.5	18.6	0.2	0.4	1.1	0.6	7.0	55.7	0.2	0.5	2.2	0.0	0.0	0.1
Ratio of care units to total population	1.6	1.6	1.5												

* The weighting used under the terms of the Madrid II scale is as follows: population from 0-4 years of age = 3; from 5-14 years of age = 2; from 15-64 years of age = 1; from 65-80 years of age = 2; from 80 years of age = 3.
Source: Prepared by M.A. Durán using data from the United Nations (2010).

group. The principal demographic conditions which affect care are the distribution of the population between the age groups, the proportion of people who live alone, the proportion of children in single-parent families, the location of the population in isolated areas, and the age and gender of the migrants. The most frequent profiles of those who demand care and of their potential carers can be established using the demographic data.

The financial conditions which affect care most are those of entry to employment (determination of the population which is only partially available for care), those of the levels of income and wealth (this determines who can have access to remunerated care services), and those of direct or indirect access to public cover for non-employment income and care services.

The social conditions of care are more diffuse and therefore more difficult to understand than the foregoing conditions. Important among them are belonging to extended networks (family, friends, neighbours), the implantation of the feeling of moral obligation to care for others, the degree to which the values of individualism and egalitarianism are established in each group, the capacity for organisation and innovation, the degree of internal conflict between groups, and the relative power of each subgroup to modify the previous forms of social organisation. All of these conditions interact together and form models of care sustained in a delicate equilibrium, which is broken when any of the conditions at all, not only material but also evaluative, are changed.

The historical variation between care models has been great: from agrarian societies of small family groups in which care is distributed on a fairly egalitarian basis to highly unequal societies in which a great part of the care has been ascribed to the lowest levels of society; and from non-family social groups in which care is exercised exclusively by the members of the group (convents, religious orders) to groups which simultaneously use various different forms of care (family, market, the State, and charitable bodies). However, more than the variety, the dominant theme has been that care is offered principally by women to members of their own family.

The unsustainability of the traditional model of care is the consequence of the increase in the number of small-sized families (demand originating from children declines, but the demand from the

elderly increases, for every family member of central age), the scarcity of relationships with the extended family, the weakening of affective and economic ties between the dependent elderly generation and the generation in a potential position of taking responsibility for care, the transformation in the type of demand, (a reduction in the basic demand originating in children, an increase in the long-term demand originating in chronically sick adults), migrations (the place where the demand is located and in which the potential carers live do not coincide), the entry of women into education and employment, and the asymmetry in the adaptation of men to the new demands for care.

8.3.1. Theoretical and regulatory proposals about new ways to distribute care

The *distribution scenarios* are purely theoretical proposals on the manners in which the care load could be distributed. They are expressed as ratios in which the divisor corresponds to the care required, and the dividend corresponds to the population or the entities which are to satisfy them; the quotient indicates the resulting *care load*. In this context it should be remembered that the care load is a part of the non-remunerated work; the sum of the remunerated work and the non-remunerated work is the *total workload* which each person or social group assumes. An *overload* is an excessive workload (physical and mental), and not only the “amount of work” but also the “intensity” and inappropriate “conditions” in which it is carried out contribute to it. Generally speaking, remunerated wage paying work has a legal framework which determines the conditions of the workload which is considered to be tolerable, but a large part of the work of the self-employed, informal work, and non-remunerated care lacks its own legal framework and has to be evaluated by comparison with remunerated work.

In the distribution scenarios, both the dividend and the divisor vary. As has been emphasised in this work, the dividend varies considerably depending upon how the age limits of the population which requires carers are set, and upon whether sick or disabled people, and those exonerated or exempt, are included. It also varies considerably depending upon whether the estimate is made using simple scales (all dependents are weighted equally) or using com-

plex scales which give a different level of demand for each type of dependent, as is done in the Madrid and Santiago de Chile scales.

The estimate of the supply is more complex than the estimate of the demand, because of the ideological implications entailed. A theoretical scenario is not a proposal for regulation or a model which is to be put into practice, but it is a first step to achieving this, whether the scenario is rejected or taken into consideration. In Table 8.23, three care distribution scenarios are shown in which the dividend has been kept stable. In order to simplify the scenario, no reference to the market, the State, or to charitable organisations has been made, and only various different possible distributions within the potential carer population have been included.

TABLE 8.23: Possible scenarios for the distribution of the care load

Scenario I			
Scenario I-A	total demand for care (hours per year) women from 15-64 years of age		
Scenario I-B	total demand for care (hours per year) women from 18-64 years of age		
Scenario I-C	total demand for care (hours per year) women from 18-70 years of age		
Scenario II			
Scenario II-A	total demand for care (hours per year) population from 15-64 years of age		
Scenario II-B	total demand for care (hours per year) population from 18-64 years of age		
Scenario II-C	total demand for care (hours per year) population from 18-70 years of age		
Scenario III		total demand for care (hours per year) population not in employment from 18-70 years of age	
Scenario IV	(total demand for care): 2 population from 18-70 years of age	+	(total demand for care): 8 State
	(total demand for care): 4 Market	+	(total demand for care): 8 Domestic and international volunteers

In the foregoing sections, the total demand for care has been estimated without paying special attention to the sick, or to the composition of the population by gender. In the scenarios in Table 8.23 only the composition of the supply has been modified, that is to say the people on whom the care load will have to fall. These are simple scenarios which can be made infinitely increasingly complex, by disaggregating the carer population into different categories and assigning them different weightings depending on their capacity for, propensity to, or rejection of, the activity of carer. The care which people in the environment do not provide free of charge has to be provided by the State, the market, and the charitable bodies. Or not provided by any of the above, leading to the supply not being satisfied.

Scenario I responds in general terms to what has been traditional, and still continues to be so, in large part in the majority of countries. It only ascribes care to women. In variant a), the carer population is of the same age as the potentially working population; in variant b) the beginning of care is delayed until the age of legal majority in many countries (18 years old); and in variant c) the end of the potential carer is delayed until seventy years old.

Scenario II is similar to Scenario I, but it ascribes the care to the potential carer without regard to their gender. This answers an egalitarian intention which is expressed as ideal, but it has still not occurred anywhere in reality, although that is the general trend.

Scenario III pays no attention to the gender of the carer in the distribution of care, but it does pay attention to whether the population is occupied or not. It describes a reality which is heavily implanted in a great number of countries, in which the time available for care has been reduced as a result of the entry of women into extra-domestic activities.

Another way of expressing more complex scenarios is to introduce the State (public services), the market (private services), and the Community, as divisors of workload. For example, Scenario IV would be like this, in which the family members take charge of half of the demand without remuneration, while private services (national and international) take charge of one quarter, and the State and national and international volunteer organisations (assistance from other governments, national and international NGOs) take charge of the remainder.

The scenarios are initiated by setting tolerable limits to the load, overloads over the medium term are forecast by a change in the current conditions, and new redistribution scenarios can be set up for the added overload. By way of illustration, according to the Informal Assistance Survey (2004), only 14% of dependents in Spain receive any type of help in addition to what the family members provide; in 51% of cases, assistance is provided by a paid domestic worker, 3% go to private companies, 9% to NGOs or different types of charitable organisations, and 37% corresponds to public entities or different Public Administration. These figures do not express the amount, or the quality, of the care, only the fact of receiving it.

Care can be transformed but not eliminated, and each society has to find the best way to reconcile the rights and obligations of those who need care and of those who, in one way or another, have to provide it to them. This is what public policies deal with, and in the case of care, they are clearly transversal; not only do they affect the most evident functions (education, health, and social policies) but also employment politics (conciliation), town planning and housing (location of services, access, and remodelling of housing), fiscal (deductions for attending to dependents) dependence insurance, and pension plans, transport (school and disabled transport), and leisure (holidays and specific programmes).

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