

**Una nova aproximació a la pobresa infantil. Aplicació de l'indicador europeu  
"reference budgets" a Catalunya per a àrees densament poblades**

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## TESI DOCTORAL

Títol	Una nova aproximació a la pobresa infantil. Aplicació de l'indicador europeu "reference budgets" a Catalunya per a àrees densament poblades
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*“All human knowledge takes the form of interpretation”*

Walter Benjamin (Berlín 1892 – Portbou 1940)

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## **Resum**

Aquesta investigació presenta la construcció de pressupostos de referència – “*reference budgets*”, els quals il·lustren cistelles de béns i serveis per assolir un nivell de vida acceptable per a diferents tipologies de família en àrees densament poblades de Catalunya, prenent Barcelona com a ciutat de referència. Aquest nivell de vida acceptable reflecteix el mínim de recursos necessaris perquè les persones puguin desenvolupar les diverses posicions i rols socials pertinents. Per elaborar aquest indicador s’han identificat deu àmbits de necessitats, els quals són operativitzats en cistelles de béns i serveis, d’acord amb un marc teòric i mètode comuns proposats recentment per a diferents ciutats europees. El contingut de les cistelles s’ha determinat en base a diferents fonts d’informació: guies oficials, consultes a experts, dades d’enquestes i grups de discussió. Els resultats per a diferents tipologies de família apunten que la cistella per a dur a terme una alimentació saludable és la que representa el major pressupost, sense considerar les despeses de l’habitatge. En canvi, les cistelles del descans, el lleure, la higiene personal i la salut representen una menor proporció del pressupost de referència total. A més, aquest indicador permet estimar el pressupost de referència per als infants de diferents edats a les llars. Tot i que els pressupostos de referència no són generalitzables al conjunt de la població, des d’aquest enfocament podem explorar una nova aproximació a la pobresa infantil, així com també ofereix un nou escenari per orientar les polítiques o l’acció social i educativa que garanteixi els drets i la inclusió dels infants.

**Paraules clau:** pressupostos de referència, nivell de vida, pobresa infantil, família, infància, necessitats.

## **Abstract**

This research presents the development of reference budgets for Catalonia densely populated areas taking Barcelona as the reference city. We have priced baskets of goods and services, which represent the minimum financial resources required to participate adequately in a society, for well-described model families –an adequate participation is defined as the ability of people to fulfill the various social positions they should be able to play as members of society. We have identified ten intermediate needs and operationalised them in priced baskets of goods and services using a common theoretical and methodological approach that has been reported for several European cities. The content of the baskets was defined taking into account a variety of sources including national guidelines, opinion of experts, survey data on cultural habits and focus group discussions. We have observed that, without considering housing and car costs, the healthy food budget is the one that represents a higher share of the total budget in all family types. Conversely, the baskets for leisure, personal care and health care represent the smallest fraction of the budget. Additionally, we have estimated the minimum budget for children of different ages for an adequate social participation. Although the reference budgets here presented cannot be generalised to the whole population, this approach explores a new insight into child poverty, as well as a new scenario to orient policies or social and educative actions to guarantee children's rights and inclusion.

**Key words:** reference budgets, standard of living, child poverty, family, childhood, needs.

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## **PART I: INTRODUCCIÓ**

### **1. Motivació personal i justificació de la recerca**

A finals de l'any 2012 el Grup de Recerca consolidat en Pedagogia, Societat i Innovació amb el suport de les Tecnologies de la Informació i la Comunicació<sup>1</sup> de la Facultat de Psicologia, Ciències de l'Educació i de l'Esport Blanquerna Universitat Ramon Llull<sup>2</sup> va incorporar-se com a *partner* voluntari en el projecte ImPRovE (*Poverty Reduction in Europe: Social policy and innovation*)<sup>3</sup>, finançat pel 7è Programa Marc de la Unió Europea (FP7/2012-2016) i liderat pel Herman Deleeck Centre for Social Policy de la Universitat d'Antwerp (CSB-UA, Anvers, Bèlgica). Aquest projecte tenia com a objectiu general analitzar la pobresa, les polítiques socials i les propostes d'innovació social en aquest àmbit a Europa.

En aquell moment, tot just començava els estudis de doctorat i per això vaig considerar que participar en aquest projecte internacional era una proposta interessant per a la meva formació. En concret, m'interessava principalment pels següents dos motius.

En primer lloc, des del 2010 estava treballant el tema de la pobresa infantil i l'acció socioeducativa integral en xarxa en el marc del projecte d'investigació i assessorament al programa CaixaProinfància<sup>4</sup>, que el grup de recerca PSITIC desenvolupa des de llavors. Per tant, conèixer les darreres aproximacions teòriques i empíriques entorn de l'estudi de la pobresa a nivell europeu, així com els efectes de les polítiques i les pràctiques d'innovació social sobre aquest fenomen podia ser un intercanvi molt enriquidor.

En segon lloc, se'ns plantejava en el marc d'aquest projecte integrar-nos en el Work-Package 13 (WP13): “Developing cross-nationally comparable reference budgets for social participation in Europe”<sup>5</sup>. Era la primera vegada que sentia a parlar de “reference budgets”. De fet, és un tema poc estudiat en el nostre país i per aquesta raó va ser també una qüestió clau per acabar d'enfocar el doctorat cap a aquesta direcció.

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<sup>1</sup> D'ara en endavant, PSITIC.

<sup>2</sup> D'ara en endavant, FPCEEb-URL.

<sup>3</sup> <http://improve-research.eu/>

<sup>4</sup> <http://www.observatorioporalapobrezacaixaproinfancia.org/>

<sup>5</sup> Equip d'investigació format per Dr. Jordi Riera i Romaní, Dra. Elena Carrillo i jo mateixa.

Definim els mencionats “reference budgets”, en català “pressupostos de referència”<sup>6</sup> – d’ara en endavant RBs<sup>7</sup> – com cistelles de béns i serveis que representen un nivell de vida determinat (Bradshaw, 1993). En concret, el propòsit d’aquesta investigació era desenvolupar per primera vegada RBs de manera comparable, utilitzant un marc teòric i mètode comú, per àrees altament urbanitzades corresponents a sis grans ciutats europees: Anvers, Atenes, Barcelona, Budapest, Helsinki i Milà. El nostre paper era construir-los per a Barcelona, la qual cosa era un repte important ja que no hi havia referents. Així, doncs, entre 2012 i 2014 vam dur a terme una recerca molt intensa treballant conjuntament amb aquests equips interdisciplinaris.

A rel d’aquesta primera experiència el 2014 es va iniciar un segon projecte europeu titulat *Pilot project for the development of a common methodology on Reference Budgets* (referència VC/2013/0554), que ha promogut la creació d’una xarxa europea d’experts en RBs<sup>8</sup> i el seu desenvolupament en 26 de les 28 capitals europees de manera comparable, el qual ha estat finançat per la Comissió Europea, DG Employment, Social Affairs & Inclusion i coordinat pel CSB-UA i Applica sprl. També ens vam incorporar en aquest segon projecte com a grup de recerca PSITIC per desenvolupar RBs en aquest cas per a la ciutat de Madrid<sup>9</sup>. Així, doncs, aquestes experiències i aprenentatge a l’entorn del desenvolupament dels RBs a Espanya, concretament a les ciutats de Barcelona i Madrid com a poblacions de referència en cada un dels projectes europeus esmentats, han estat la llavor d’aquesta tesi doctoral i un escenari idoni per desenvolupar-la.

Finalment, aquesta investigació ha comptat amb el suport del *Programa de Formación de Profesorado Universitario – FPU (Convocatoria 2012)* del Ministerio de Cultura, Educación y Deporte. A més, aquesta beca ha permès desenvolupar una part d’aquesta investigació en el marc d’una estada de tres mesos al CSB-UA, centre de referència en l’anàlisi de la pobresa, pioner en el desenvolupament d’una metodologia comparable per a la construcció de RBs a nivell Europeu. Aquest ajut ha estat una gran oportunitat tant a nivell acadèmic com personal per poder elaborar aquest treball.

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<sup>6</sup> Terme que cal distingir de la “Encuesta de Presupuestos Familiares” (EPF) que elabora l’Institut Nacional d’Estadística (INE) per avaluar la despesa de les llars.

<sup>7</sup> Farem servir l’abreviació anglesa, ja que una part de la tesi està redactada en anglès.

<sup>8</sup> European Reference Budgets Network: <http://www.referencebudgets.eu/>

<sup>9</sup> L’equip de treball va estar format pel mateix equip anterior i la col·laboració del Sr. Gerard Pintó.

## 2. Delimitació i formulació del problema

Des de l'any 2007 la població que viu en situació de pobresa o exclusió social ha augmentat a Espanya. Aquesta tendència posa de manifest la dificultat d'assolir l'objectiu nacional fixat en l'*Estratègia Europea 2020*: reduir en 1.400.000 les persones en situació de pobresa i exclusió social.

L'any 2015 s'estimava que a Espanya un 28,8% de la població vivia sota el llindar de risc a la pobresa o exclusió social. L'indicador defineix la població en risc de pobresa o exclusió social – la taxa *AROPE*, *at-risk-of-poverty and social exclusion*, utilitzant les sigles en anglès – com la que es troba en alguna de les següents situacions: a) tenir una renda personal equivalent inferior al 60% de la mediana de la distribució de la renda (pobresa relativa o monetària); b) estar en situació de carència material severa (manca de 4 ítems d'un llistat de 9<sup>10</sup>) o c) viure en una llar on hi ha baixa intensitat de treball, és a dir, en una llar on els membres de les quals van realitzar aquesta activitat en un 20% menys respecte del seu potencial de treball per l'any de referència. Aquest percentatge és d'un 34,4% quan ens fixem en la població de menys de 18 anys. La mitjana de la taxa *AROPE* pel total de la població i pels menors de 18 anys dels 28 països europeus és de 23,7% i 26,9%, respectivament (Eurostat, 2017a). En conseqüència, s'observa que la taxa *AROPE* espanyola és més alta en ambdós casos.

El percentatge de persones en risc de pobresa o exclusió social ha crescut també a Catalunya. Dades de l'Institut d'Estadística de Catalunya per a l'any 2015 mostren que el 23,5% de la població catalana i el 31,7% dels infants menors de 18 anys estan en risc de pobresa o exclusió social (Idescat, 2017f). Aquestes dades s'han estimat utilitzant la mitjana de la renda d'aquesta Comunitat Autònoma, que segons UNICEF és l'aproximació més adequada per calcular la pobresa infantil i com a referència per guiar les polítiques socials locals (UNICEF, 2000 i 2007). La mateixa font fixa el llindar de la pobresa relativa a Catalunya per l'any 2014 en 9.667,30 Euros per una llar d'una persona i de 20.301,30 Euros per una llar de dos adults i dos infants. En conseqüència, el 19% de la població viu per sota d'aquest llindar (Idescat, 2017c).

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<sup>10</sup> Els ítems del llistat són: pagar el lloguer o lletra; mantenir la llar a una temperatura adequada; fer front a despeses imprevistes; menjar carn, pollastre o peix (o equivalents en dieta vegetariana) com a mínim tres cops per setmana; pagar unes vacances d'una setmana/any; un cotxe; una rentadora; un aparell de televisió; un telèfon (fixe o mòbil). (González-Bueno, Bello i Arias, 2012).

Un dels punts més qüestionats de l'enfocament econòmic a la pobresa relativa, és el fet que determina el llindar de la pobresa a partir de fixar un punt arbitrari de la distribució de la renda (Borgeraas i Brusdal, 2008). La qüestió fonamental és, doncs, saber si viure per sobre d'aquest llindar és suficient. El segon punt és que aquesta aproximació ha tingut escàs impacte en les polítiques (Bradshaw, Mitchell i Morgan, 1987). El Consell de la Unió Europea l'any 1975 va definir les persones en situació de pobresa de la següent manera: "individuals or families whose resources are so small as to exclude them from the minimum acceptable way of life of the Member State in which they live" (Art.Nº1.2). Algunes qüestions que emergeixen d'aquesta definició són doncs, quin és aquesta forma de vida acceptable? I quins són els recursos que es requereixen en una societat en particular per assolir-lo?

Tal com s'ha presentat en l'apartat anterior els RBs són cistelles de béns i serveis que representen un nivell de vida determinat per a diferents tipologies de família. Per aquesta raó és una aproximació que pot ser d'utilitat per respondre a aquestes qüestions (Bradshaw *et al.*, 1987; Bradshaw, 1993). En aquesta recerca el nivell de vida al qual faran referència els RBs és:

"the minimum financial resources required to participate adequately in society. Adequate social participation is defined as the ability of people to adequately fulfill the various social roles they should be able to take on as members of society" (Goedemé, Storms, Stockman, Penne i Van den Bosch, 2015a:5)

Per tant, el nivell de vida s'estableix com aquells recursos mínims que permeten a les persones participar com a membres d'una societat i complir amb els seus rols socials, és a dir, les expectatives socialment definides associades a una posició social (Giddens i Sutton, 2013). En el context europeu, algunes d'aquestes posicions podrien ser, per exemple: ser 'mare' o 'pare', 'ciutadà', 'estudiant', entre altres, segons l'aproximació a partir del *Charter of Fundamental Rights of the European Union* (2000) (Goedemé, Storms, Penne i Van den Bosch, 2015b:25). En conseqüència, assumim que el nivell de vida acceptable seria poder assolir aquest mínim de recursos necessaris per poder dur a terme el desenvolupament d'aquestes posicions i rols socials pertinents a la nostra societat<sup>11</sup>.

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<sup>11</sup> En el marc teòric es detalla aquesta qüestió.

El marc de referència per estructurar aquestes cistelles de béns i serveis serà la teoria de les necessitats humanes de Doyal i Gough (1984, 1994), d'acord amb la proposta realitzada per Storms, Goedemé, Van den Bosch i Devuyst (2013) en el projecte ImPRovE, tal com s'exposarà en el capítol de fonamentació teòrica. Així, doncs, des d'una perspectiva més holística es determinarà aquest mínim de recursos necessaris des de l'evidència empírica i el consens amb els ciutadans mitjançant grups de discussió. Aquest enfocament pot ser definit com una fórmula més democràtica d'aproximar-se a la pobresa, al mateix temps que mostra cert potencial per superar la mesura tradicional de pobresa relativa basada en marcar un llindar arbitrari segons la distribució de la renda (Lister, 2004).

En aquesta investigació presentarem, doncs, la construcció de RBs que reflecteixen els mínims recursos necessaris perquè les persones assoleixin un nivell de vida acceptable en àrees densament poblades de Catalunya. D'aquesta manera, desenvolupem un nou indicador social que permet comprendre les necessitats de les famílies i els infants des d'una perspectiva més global. Alhora, permet generar una nova aproximació al fenomen de la pobresa en el nostre context.

### 3. Interrogants i objectius de la recerca

A continuació, formulem els interrogants de la recerca en format pregunta, ja que no ens plantejem unes hipòtesis en sentit demostratiu pròpies de la recerca de caràcter experimental, sinó que busquem descriure i interpretar el fenomen d'estudi. Al final d'aquesta investigació respondrem a aquestes qüestions.

#### 3.1. Interrogants de la recerca

Pregunta 1. *Hi ha un consens social entorn el mínim de recursos necessaris perquè les famílies assoleixin el nivell de vida acceptable<sup>12</sup> en àrees densament poblades de Catalunya?*

Pregunta 2. *Quin és el pressupost de referència mínim necessari perquè les famílies amb infants assoleixin el nivell de vida acceptable en àrees densament poblades de Catalunya?*

Pregunta 3. *Com els pressupostos de referència podrien ser una aproximació complementària a l'indicador de pobresa relativa<sup>13</sup> en àrees densament poblades de Catalunya?*

En base a aquestes preguntes seguidament configurem els objectius d'aquesta investigació.

#### 3.2. Objectius de la recerca

Objectiu 1: *Desenvolupar els pressupostos de referència en àrees densament poblades de Catalunya.*

Objectiu 2: *Explorar els pressupostos de referència com a indicador per contextualitzar la pobresa relativa en àrees densament poblades de Catalunya.*

El primer objectiu es vincula a les preguntes 1 i 2. Per donar-hi resposta hem realitzat l'Estudi de camp 1. L'objectiu 2 fa referència a la pregunta 3 i l'hem desenvolupat en l'Estudi de camp 2.

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<sup>12</sup> Nivell de vida acceptable és defineix a l'apartat anterior: Delimitació i formulació del problema.

<sup>13</sup> Pobresa relativa o monetària: es defineix a l'apartat anterior: Delimitació i formulació del problema.

#### 4. Epistemologia i metodologia de la investigació

La recerca que s'ha dut a terme s'emmarca en el paradigma interpretatiu, comprnent la realitat com una construcció social i humana i, per tant, interpretable (Gómez Serra, 2000). En aquest sentit el coneixement esdevé relatiu, contextual i de caràcter intersubjectiu. A més, cal subratllar una particularitat específica d'aquesta recerca i és el fet que pretenem construir un nou indicador social en base a diferents fonts d'informació. Per tant, com a investigadors prenem part en la recerca en la mesura que analitzem i interpretem les dades recollides per construir els RBs. Per assolir aquesta tasca amb rigor ha estat essencial explicitar molt detalladament tots els processos seguits.

A nivell metodològic hem escollit al llarg de la recerca aquells mètodes que millor podien respondre als objectius de la investigació, tenint en compte els seus avantatges i limitacions, tal com ens indiquen Quivy i Campenhoudt (2004). Per tant, per donar resposta a les preguntes d'investigació hem utilitzat una aproximació metodològica mixta.

En aquest sentit, hem començat la recerca amb una revisió bibliogràfica que constitueix la fonamentació teòrica que orientarà el treball de camp, el qual s'ha dividit en dos estudis. Un primer estudi que engloba el desenvolupament de RBs per a diferents tipologies de família i el seu contrast per àrees densament poblades de Catalunya mitjançant grups de discussió amb ciutadans. Així, doncs, en aquest Estudi 1 hem emprat una metodologia principalment qualitativa. Mentre que l'Estudi 2 hem aplicat una anàlisi estadística que ens ha permès explorar els RBs com a llindar de pobresa a través de l'*European Union Statistics on Income and Living Conditions*<sup>14</sup> (EU-SILC) i comparar-lo amb l'indicador de pobresa relativa.

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<sup>14</sup> Enquesta de Condicions de Vida de la Unió Europea.



## 5. Organització i estructura formal de la investigació

Després de la Introducció presentarem en la Part II la fonamentació teòrica d'aquesta recerca. En aquest punt s'elabora primer un estat de la qüestió sobre els principals indicadors de pobresa utilitzats en el nostre context i se'n fa una revisió crítica, particularment, quan volem estudiar la realitat dels infants. En segon lloc, es descriu la recerca sobre els RBs a Europa i la seva aplicació en el nostre país a partir de la col·laboració en els dos projectes esmentats, així com la seva potencialitat en l'àmbit dels estudis sobre la pobresa i en el camp social i educatiu.

Seguidament a la Part III es detalla la Metodologia del treball empíric, d'acord amb les preguntes i objectius plantejats en aquesta recerca. Es descriuen, doncs, les fases d'ambdós estudis empírics realitzats.

A continuació, a la Part IV s'exposen els resultats obtinguts d'ambdós estudis. L'Estudi 1 constitueix la part més extensa, ja que es presenta el contingut dels RBs i el seu desglossament en deu cistelles de béns i serveis. A més, s'inclou un capítol introductori sobre les posicions socials i les necessitats intermèdies, així com un de conclusiu on s'agrupen totes les cistelles i l'anàlisi específic del pressupost de referència per a les llars amb infants. El segon Estudi 2 planteja els RBs com a llindar de pobresa a partir de les dades disponibles per a Catalunya a l'EU-SILC i la seva comparativa amb l'indicador de pobresa relativa.

A la Part V s'enfoca la discussió dels resultats obtinguts, tot donant resposta a cadascuna de les preguntes de recerca plantejades en aquesta introducció, així com també reflexionar sobre les principals limitacions trobades durant aquesta recerca. Aquests dos grans blocs de resultats i discussió estan redactats en anglès<sup>15</sup>.

Finalment, a la Part VI, es conclou amb una síntesi de les principals aportacions d'aquesta tesi, així com es plantegen futures línies de recerca i àmbits de transferència d'aquesta investigació.

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<sup>15</sup> Es presenten aquests dos capítols en anglès perquè redactar una part de la tesi en una llengua diferent de les oficials a l'Estat espanyol és un dels criteris per optar a la menció internacional en el títol de Doctor. Els apartats escollits per ésser exposats en anglès han estat els capítols de resultats i discussió, ja que part del contingut d'aquests s'ha elaborat en el marc del projecte europeu ImPROVE. A més, també es presenta el resum i les conclusions (Part VI) en anglès d'acord amb els requisits per optar a la menció internacional.

## 6. Principis ètics

Mitjançant diversos procediments hem complert amb els principis ètics de tota recerca que, tot seguint França-Tarragó (1996) són els següents: beneficència, no maleficència, autonomia i justícia.

Primer, pel que fa al principi de beneficència, la voluntat d'aquest treball s'orienta a comprendre millor la problemàtica de la pobresa infantil en el nostre país a través de la revisió dels indicadors actuals i la construcció d'un nou paràmetre que ens permet aproximar-nos d'una forma més holística a les necessitats dels infants i les seves famílies en àrees densament poblades de Catalunya. Així, doncs, el fi últim d'aquesta recerca és generar un nou indicador per comprendre les situacions de pobresa i poder orientar les accions socioeducatives i les polítiques socials per garantir els drets i la inclusió de la infància.

En relació als principis de no maleficència i autonomia, hem tingut especial cura a no causar perjudici amb la nostra recerca i assegurar una participació lliure i voluntària dels entrevistats. Per garantir aquests principis hem seguit una sèrie de procediments.

Pel que fa a l'Estudi 1 i en el cas de la realització dels grups de discussió, vam obtenir el permís de la direcció del centre escolar o entitat social col·laboradora d'on procedien les persones participants, així com també vam acordar les condicions particulars d'organització dels grups i de l'ús dels seus espais per realitzar aquesta activitat. També vam proporcionar als participants el full d'informació de la investigació on s'explicaven els objectius i condicions de participació per demanar la seva col·laboració voluntària. Els consentiments informats van ser signats pels participants i l'equip d'investigació i cada una de les parts se'n va quedar una còpia.

En el cas dels adolescents menors de 18 anys es va fer el mateix procediment i es va demanar la seva col·laboració voluntària en l'estudi mitjançant un full informatiu i consentiment informat específic, a més de requerir-ne un altre pels seus pares o tutors legals. En tots els casos s'ha garantit la confidencialitat de les informacions obtingudes i l'anonimat dels participants en els grups de discussió. Aquests elements han estat fonamentals tant per assegurar el rigor científic i ètic com per fer emergir un clima de confiança mútua entre entrevistats i entrevistadora. Tan els joves com els adults participants en la recerca van rebre una petita gratificació per la seva aportació i temps

dedicat. Aquest protocol va ser aprovat per la Comissió d'Ètica i Recerca de la FPCEEB-URL.

Respecte a l'Estudi 2 en el que s'han treballat les microdades de l'EU-SILC, s'ha seguit el protocol i requisits acordats amb Eurostat en el document signat "*individual confidentiality declaration*" que inclou assegurar que les dades només s'utilitzaran pels propòsits de la recerca; que es guardaran les dades en un lloc segur; que se citarà correctament les fonts d'informació en qualsevol publicació; que és preservarà la informació confidencial que hi pugui haver a les microdades; que s'informarà a Eurostat de les publicacions que es derivin de la recerca i que es destruiran les dades i tots els arxius i variables derivades un cop acabat el període de recerca. Per últim i, en relació al principi de justícia, hem tractat a tots els participants en la recerca per igual i tots els centres participants han tingut les mateixes condicions.

## **PART II: MARC TEÒRIC**

### **1. Introducció**

Quan ens aproximem al concepte de pobresa veiem que no està desvinculat del moment històric en el qual vivim. La pobresa entesa com una forma de desigualtat no s'expressa de la mateixa manera en totes les societats ni en tots els temps. La preocupació per discernir la frontera entre la població pobra i la que no ho és continua sent avui un debat (Sarasa, 2005). Alhora, el fet d'apropar-nos a aquest fenomen no deixa de reflectir que estem construint una realitat, un objecte d'estudi des d'una mirada concreta, parcial i contextualitzada (Jolonch, 2002).

Tenint presents aquests elements, en aquest apartat es planteja una aproximació a com s'ha definit la pobresa infantil a les societats avançades. El recorregut mostrarà que des de mitjan de la primera dècada del segle XXI estem davant d'un canvi de paradigma en la definició del fenomen. A partir d'aquest moment, tant en el panorama internacional com nacional emergeixen estudis que qüestionen una concepció unidimensional de la pobresa infantil definida en base a paràmetres de caràcter econòmic i aposten per una concepció més multidimensional.

En primer lloc, s'exposa l'aproximació econòmica a la pobresa infantil atenent als seus trets principals, avantatges i problemes que comporta. En segon lloc, ens aturarem a l'origen i característiques de l'enfocament multidimensional, així com també en valorarem la seva utilitat de cara a una nova interpretació i comprensió del fenomen que pot donar peu a plantejar accions més innovadores per fer front a la problemàtica<sup>16</sup>. Per últim, presentem la perspectiva dels RBs i les seves principals característiques, la qual pot generar un canvi de paradigma en el nostre context, tant en la definició de la problemàtica com en l'àmbit de l'acció social i educativa. Descriurem el seu desenvolupament recent en el context europeu des d'un marc teòric i mètode comú en el projecte ImPRovE, el qual permet la comparabilitat entre països. Així, doncs, s'exposa l'operacionalització d'aquesta aproximació, que és el model d'anàlisi que seguim en aquesta recerca.

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<sup>16</sup> Part d'aquest capítol es basa en Cussó i Riera (2013). En aquest article també es contextualitzen les principals transformacions socioeconòmiques que afecten els infants en el marc de l'estat del benestar actual en el nostre país, així com també es planteja que cal avançar vers un estat relacional per fer front a la pobresa infantil.

## 2. Aproximació econòmica (o monetària) a la pobresa infantil

En el nostre context s'ha deixat al marge una concepció absoluta o universal de la pobresa que va predominar des de final del segle XIX fins a mitjan del segle XX, caracteritzada per fixar un nivell mínim per satisfer les necessitats bàsiques independentment del context. Per contra, s'ha acceptat la idea de pobresa relativa que implica que s'està definint una posició de desavantatge envers algú. Des d'aquesta perspectiva s'estableixen llinars per sota dels quals una persona és considerada pobra en una societat concreta (Sarasa, 2005; Subirats (coord.), 2004). Aquesta visió de la pobresa és la que ha estat adoptada en el context europeu. La pobresa relativa es defineix de la següent manera: "aquelles llars els membres de les quals tenen una renda personal equivalent inferior al 60% de la mitjana de la distribució de la renda" (Sarasa, 2005:80).

La fixació amb els ingressos de la llar suposa també ponderar el nombre de membres de la llar i la seva edat. És per aquest motiu que es parla de renda personal equivalent, ja que s'estableixen escales d'equivalència per posar de relleu aquesta composició demogràfica (Jolonch, 2008). En general, s'utilitza a la Unió Europea (UE) l'escala de l'Organització per a la Cooperació i el Desenvolupament Econòmic (OCDE), on un adult tindria un valor 1; el segon adult i majors de 14 anys, 0,5; i per cada menor de 14 anys, 0,3; valors que sumats entre ells configuren la unitat de consum (UNICEF, 2011)<sup>17</sup>.

S'obté una definició i mesura de la pobresa de caràcter monetari, majoritàriament calculada a partir de posar de manifest les diferències dels ingressos i ponderada pel nombre de membres de la llar, ja que es considera que hi ha unes despeses fixes de la llar independentment del nombre de membres. Hi ha veus crítiques a l'ús d'aquesta fórmula per establir aquest llinar, ja que la ponderació dels infants en 0,3 punts podria resultar una infravaloració del pes dels nens/es en el consum de la llar, segons arguments d'UNICEF (2011).

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<sup>17</sup> El 2014 el llinar espanyol va ser de 7.961 euros per llars d'una persona i de 16.719 euros per llars amb dos adults i dos infants (menors de 14 anys), el que suposa que un 22,2% de la població vivia per sota d'aquest llinar. Pel que fa al llinar català va ser de 9.767 euros i de 20.511 euros, respectivament. (Idescat, 2015c), amb un 20,9% de la població que vivia per sota d'aquest llinar.

S'observa que la taxa relativa de pobresa infantil s'ha mantingut estable a l'entorn del 24% entre els anys 2004 i 2009. En conseqüència, algunes anàlisis han posat de manifest que la bonança econòmica té pocs efectes sobre la pobresa si no va acompanyada de mesures polítiques suficients per combatre aquesta problemàtica (González-Bueno *et al.*, 2012). Des de diferents experts, s'insisteix reiteradament que des del punt de vista de l'infant seria més adequat prendre el llindar de pobresa a partir de la mitjana de distribució de la renda de la província, ciutat o barri, en lloc de la mitjana nacional, la qual cosa faria variar aquests mals resultats en algunes regions, alhora que serviria com a referència per a les polítiques a nivell més local (UNICEF 2000; 2007; Flaquer i Villà, 2008). S'han fet avenços en aquest sentit i, des de l'any 2010, hi ha dades que mostren com el rànquing de comunitats autònomes difereix en el cas d'agafar com a punt de referència el llindar de pobresa de cada comunitat a partir de la relació d'ingressos de les famílies en aquell territori<sup>18</sup>. En conseqüència, es pot concloure que el càlcul de la taxa de pobresa en base a prendre com a referència la distribució de renda d'un territori concret enlloc del llindar d'ingressos nacional configura una imatge més acurada de la pobresa infantil en aquesta comunitat.

A banda d'observar que la taxa relativa de pobresa infantil no és homogènia territorialment i que, a més, depèn del tipus de llindar del qual es parteix per calcular-la, la perspectiva monetària ofereix alguns avantatges en relació al fet d'acotar millor la problemàtica dels infants i joves.

En primer lloc, la taxa relativa de pobresa, donat que el seu càlcul es fa a partir de la distribució de renda en base als ingressos, permet mesurar l'impacte de les transferències socials en la disminució de la pobresa i comparar els efectes redistributius de les polítiques socials tant entre països com segons els diferents grups poblacionals. Pel que fa a Espanya es constata la manca de capacitat del sistema d'ajudes i transferències per reduir la pobresa infantil, mentre que sí que és efectiu en la reducció de la pobresa en els adults i en la tercera edat (Cantó, 2014).

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<sup>18</sup> És rellevant el cas de Ceuta, on la taxa de pobresa entre els 0 i els 17 anys disminueix 17,2 punts percentuals el 2013 quan és calculada a partir de tenir en compte el llindar d'ingressos autonòmic (passa del 58% al 40,8%). Les autonomies que semblaven ésser més afavorides augmenten la seva taxa de pobresa entre 0 i 17 anys respecte de quan es pren com a referència el llindar nacional el 2013: Navarra (24,1%); Astúries (31,2%); Madrid (25,8%) i Catalunya (27,6%), augmenten la seva taxa entre 9 i 8 punts percentuals (González-Bueno i Bello, 2014:51).

En segon lloc, la taxa de pobresa relativa també pot incorporar la intensitat com una dimensió més utilitzada per distingir la gravetat de la situació de pobresa. A tall d'exemple, l'*Informe de la Inclusió Social a Espanya 2009*, dirigit per Pau Marí-Klose, considera el llindar per sota del 60% de la mitjana com a pobresa moderada, mentre que situar-lo al 40% de la mitjana de la distribució de la renda seria per obtenir una mesura de pobresa alta i agafar el 25% de la mitjana serviria per captar la pobresa extrema. Per a Sarasa (2005) aquests criteris no deixen de ser arbitraris, així que cada estudi ha d'explicitar quins utilitza.

Per últim, una altra dimensió que permet incorporar la pobresa en termes monetaris és la temporalitat<sup>19</sup>, és a dir, la durada de la situació de pobresa, ja que aquesta pot tenir un caràcter conjuntural o crònic. En el primer cas, seria un episodi concret que en principi no es prolongaria en el temps. En el segon, estaríem més a prop de considerar que es tracta d'una pobresa econòmica que pot conduir a un procés més global de mancances en diferents àmbits, atesa la seva persistència (Sarasa, 2005). En aquest sentit, dur a terme anàlisis longitudinals ajudaria a observar aquestes entrades i sortides i, en conseqüència, planificar unes polítiques més acurades a la realitat (Flaquer, 2008). Observar, doncs, la perpetuació en el temps i la intensitat de la pobresa és important perquè obre les portes a considerar la diversitat i la gravetat de les situacions de pobresa econòmica, així com de les seves múltiples conseqüències.

Tot i reconèixer que la taxa de pobresa relativa a partir dels ingressos ajuda a figurar la magnitud d'aquesta problemàtica a les societats del benestar cada vegada es constata que és una mesura que cal complementar-la amb altres. Sorgeixen qüestions sobre si els ingressos de la llar són una mesura adequada per saber els recursos reals disponibles per a un nen tal com s'assenyala en el *Report Card 10* publicat pel Centro de Investigaciones Innocenti de UNICEF (2012). Aquest informe posa en dubte la fiabilitat de l'establiment de la taxa relativa de pobresa infantil a partir dels ingressos de la llar pels següents motius: es poden donar casos d'ingressos a la llar fluctuants en el temps o bé d'ingressos provinents de l'economia submergida que no quedin recollits; la mesura no té en compte la recepció per part de la llar d'estalvis acumulats o ajudes informals provinents d'altres familiars, que poden fer augmentar els ingressos

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<sup>19</sup> Percentatge de llars amb nens que pateixen pobresa crònica (en pobresa relativa durant 3 anys dels 4 anteriors (incloent l'actual) (González-Bueno *et al.*, 2012:44). A Espanya un 18,7% de nens/es estaven en aquesta situació l'any 2012 (González-Bueno i Bello, 2014:50).

disponibles, o ans al contrari, el pagament de deutes; tampoc no inclou que hi ha serveis bàsics que no tots els països cobreixen totalment com són la sanitat, l'educació o serveis de cura als infants i, per tant, això pot fer minvar els ingressos realment disponibles d'una llar, entre d'altres.

### **3. Un dels complements de la perspectiva monetària: la privació relativa**

La cerca d'indicadors complementaris es fa evident davant la insuficiència que proporciona la mesura de la pobresa en termes monetaris. És en aquesta línia que ha treballat el *Report Card 10* cercant la complementarietat entre ambdós enfocaments mitjançant l'ús de la taxa relativa de pobresa infantil a cada país de l'OCDE i el nivell de *privació relativa* dels infants per a realitzar una comparativa internacional a l'entorn de la pobresa infantil. La privació relativa en una societat determinada es refereix a la manca d'accés a béns o serveis comuns en un context concret.

És interessant observar com Espanya assoleix una posició diferent dins el rànquing de països segons una o altra mesura en relació a la pobresa infantil. Segons les dades que mostren l'estudi, un 17,1% dels nens i joves espanyols (de 0 a 17 anys) viuen en pobresa relativa, definida com viure en una llar en la qual el nivell de renda disponible està per sota del 50% de la mitjana de la renda nacional. Aquesta xifra situa aquest país a la cua del rànquing, en la 26a. posició entre els 29 països analitzats<sup>20</sup>. En canvi, en l'anàlisi del nivell de privació relativa dels nens entre 1 i 16 anys, calculat sobre la base de constatar la mancança de 2 o més ítems sobre un llistat de 14 elements, Espanya assoleix l'11a. posició, amb un 8,1% de nens en aquesta situació (UNICEF, 2012: 2-3).

Les dades presentades al paràgraf anterior posen de manifest que l'anàlisi de les privacions pot ser un indicador complementari a la taxa relativa de pobresa. Alhora, és un instrument que assenyalava els àmbits de necessitats concrets a cobrir i que pot ajudar a la direcció de polítiques més específiques per disminuir les privacions dels infants en un país determinat i, per tant, apostar per al seu benestar en tots els sentits. En aquest sentit, des de 2009 la Comissió Europea ha incorporat indicadors de privació material en l'anàlisi de la pobresa en els països europeus. Es considera estar en situació de privació

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<sup>20</sup> El rànquing de la taxa relativa de pobresa infantil inclou sis països més: Austràlia, Canadà, Japó, Nova Zelanda, Suïssa i els Estats Units, fet que suposa un total de 35 països. Però, atès que al rànquing a l'entorn del nivell de privació relativa dels infants no s'inclouen aquests països per manca de dades, s'ha optat per eliminar-los del primer rànquing i, d'aquesta manera, analitzar la posició d'Espanya en ambdós rànquings sobre un total de 29 països. La font de les dades europees és EU-SILC 2009.



material quan hi ha manca en 3 ítems d'un llistat de 9 i en privació material severa quan la manca se situa per sobre de 4 ítems. Tanmateix, en els treballs de Guio, Gordon i Marlier (2012) i Guio i Marlier (2013) es detalla que s'està ajustant el llistat d'aquests ítems per avaluar millor la situació de pobresa material dels adults com dels infants. En aquests estudis proposen ampliar aquest indicador a 13 i 18 ítems en el cas dels adults i els infants, respectivament. Unes dades que han estat recollides en la onada 2013 de l'enquesta EU-SILC 2013 i que en aquest moment estan analitzant per validar aquest nou indicador (Marlier, 2016).

#### **4. Benestar infantil: una aproximació multidimensional a la pobresa infantil**

Malgrat la introducció d'aquestes altres dimensions com a complements de l'anàlisi de la pobresa en termes econòmics com la temporalitat, la intensitat o la privació relativa, les mancances generals d'aquesta perspectiva monetària surten a la llum, sobretot quan volem estudiar el col·lectiu d'infants. Des de mitjan de la primera dècada d'aquest segle s'està apuntant cada vegada més la necessitat de conceptualitzar-la des d'una perspectiva que contempli altres dimensions del benestar infantil de forma dinàmica (Ayala, Martínez i Sastre, 2006). Un intent recent d'aproximar-se a la pobresa infantil atenent aquesta multidimensionalitat i les necessitats més lligades al benestar infantil és la proposta de Bradshaw i els seus col·laboradors de la Universitat de York (Bradshaw, Hoelscher i Richardson, 2007), els quals elaboren un model compost per vuit dimensions: benestar material; salut; benestar educatiu; relacions; conductes i riscos; benestar subjectiu; habitatge i entorn, i participació cívica.

Cada dimensió té els seus corresponents indicadors els quals se centren tant en mesures objectives com subjectives que recullen les privacions materials i no materials dels infants. L'objectiu és configurar una visió internacional de la problemàtica més enllà de la possibilitat comparativa que ofereix el càlcul de la pobresa en termes monetaris, la qual es entesa pels mateixos autors com una mesura de distribució de la renda (IUNDIA, 2009). Això no vol dir que haguem de menystenir els indicadors de pobresa econòmica, ja que aquesta dimensió de la pobresa infantil pot ser el desencadenant de dificultats en d'altres àmbits com la salut, l'aprenentatge, la conducta i les relacions (UNICEF, 2007).

El Centre d'Investigacions Innocenti d'UNICEF (IRC-UNICEF) va aplicar aquest model multidimensional per aproximar-se a la situació de la infància en els països de l'OCDE, per primera vegada en el seu *Report Card 7* de l'any 2007. L'informe utilitza sis de les dimensions exposades per Bradshaw i els seus col·laboradors en l'estudi anterior: benestar material, salut, benestar educatiu, relacions, conductes i riscos i benestar subjectiu. Els indicadors recollits al *Report Card 7* provenen de diverses fonts i el propòsit és realitzar una comparativa internacional. La dificultat d'aquesta tasca rau en el fet de trobar dades disponibles i comparables entre països.

Aquest model d'anàlisi a partir d'una aproximació multidimensional crea una altra realitat respecte les condicions de vida de la infància a l'estat espanyol molt diferent de la que es basa en termes exclusivament monetaris, on l'estat se situa any rere any a la cua del rànquing dels països de la Unió Europea. L'estudi posa de relleu que l'estat espanyol se situa en la 5a. posició respecte els 21 països analitzats de l'OCDE en aquest índex compost per aquestes sis dimensions. On hi ha més mancances és en la dimensió educativa i material (UNICEF, 2007). Per contra, l'actualització realitzada per la mateixa institució el 2013 publicada en el *Report Card 11*, després de la crisi econòmica, situa l'estat espanyol a la posició 19a. d'entre 29 països (UNICEF, 2013).

En resum, des d'aquest enfocament la pobresa infantil es defineix com a contrària al benestar infantil entès de manera multidimensional, d'acord amb els drets dels infants (IUNDIA, 2009). És en aquesta línia que des d'UNICEF Espanya i conjuntament amb l'Observatori d'Infància i Adolescència del Principat d'Astúries s'ha aplicat aquesta perspectiva en el context espanyol. A partir d'una metodologia participativa, el 2010 es presentà una proposta de *Sistema d'Indicadors sobre Benestar Infantil* (SIBI) a Espanya, que es compon de les següents 7 dimensions i de 49 indicadors: educació, salut i seguretat; benestar material; entorn familiar i social; infància vulnerable; estils de vida i benestar subjectiu (UNICEF, 2010). La voluntat d'aquest enfocament és observar periòdicament els diferents àmbits de necessitats dels infants, no només l'econòmic, mitjançant la recollida d'indicadors de resultat i amb l'infant com a unitat d'anàlisi i, sobretot, amb la introducció també d'indicadors subjectius. Actualment, ja s'han realitzat dues actualitzacions d'aquest sistema d'indicadors (González-Bueno *et al.*, 2012; González-Bueno i Bello, 2014). Aquesta aproximació multidimensional no només afavoreix una mirada global del fenomen, sinó

que també ajuda a establir quines han de ser les principals línies a seguir en les polítiques d'infància (IUNDIA, 2009), concretades en mesures impulsades conjuntament des de diferents camps, polítiques d'ocupació, de formació, d'habitatge, de conciliació de la vida laboral i familiar, d'ampliació o revisió de serveis i prestacions a les famílies, entre d'altres (Flaquer, 2008; Marí Klose (dir.), 2009).

## **5. Els “reference budgets” com a indicador en el context europeu**

Des del anys noranta hi ha hagut una recuperació del desenvolupament de RBs en molts dels països europeus (Storms i Van den Bosch, 2009; Vranken, 2010; Storms *et al.*, 2014). Com s'ha dit a la introducció d'aquest treball són cistelles de béns i serveis que representen un nivell de vida determinat (Bradshaw, 1993). L'interès per aquest indicador també ha augmentat des de que les institucions europees han establert els objectius de l'*Estratègia Europea 2020*.

Concretament, des del *Social Investment Package*, la Comissió Europea promou des de febrer del 2013 el desenvolupament d'aquest mètode com a instrument per a millorar la mesura de la pobresa, així com també per avaluar i dissenyar eficients i adequades mesures de protecció social en els Estats Membres (European Commission, 2013a).

### **5.1. Principals característiques dels “reference budgets”**

Les principals característiques d'aquest indicador són les següents: (a) reflecteix el mínim nivell de vida acceptable en una societat i en un moment determinat, utilitzant sovint l'opinió de grups de referència en aquella societat; (b) pot ser actualitzat anualment utilitzant l'índex de preus al consum o d'acord amb els canvis que s'experimentin en la societat en relació a aquest nivell de vida en un moment determinat; (c) té en compte els béns i serveis d'abast públic i les transferències en espècies. Per tant, permet estimar l'esforç econòmic que han de fer les famílies per assolir un nivell de vida determinat i, finalment, (d) il·lustra la variació de necessitats segons el tipus de llar i avalua, en particular, la inversió que representen els infants dins les llars (Borgeraas i Dahl, 2010; Decancq, Goedemé, Van den Bosch i Vanhille, 2013; Goedemé i Rottiers, 2011; Storms, Goedemé i Van den Bosch, 2011). En conseqüència i, donats aquests elements, els RBs entesos com a indicador constitueixen un enfocament potencial per contextualitzar la pobresa i, especialment, si es desenvolupen

transversalment als diferents països des d'un marc teòric i un mètode comú (Goedemé *et al.*, 2015a).

A més, s'identifiquen altres camps d'aplicació dels RBs si s'assegura que estan construïts de manera rigorosa i transparent. D'una banda, i en un nivell més 'macro' poden orientar les polítiques socials. En concret, serveixen per analitzar l'adequació de les pensions i salaris mínims o els ingressos mínims establerts per a la protecció social (Storms *et al.*, 2014). D'una altra, a un nivell més "micro", poden ser útils com a eina per a l'assessorament en temes d'endeutament, l'avaluació de les necessitats individuals i familiars i, fins i tot, per promoure l'autonomia i les competències de les persones en situació de pobresa des de l'acompanyament a partir del treball social i educatiu. Alguns exemples serien fomentar les competències financeres per a la gestió de la vida quotidiana o també augmentar les habilitats culinàries per promoure una alimentació saludable i de qualitat en grups vulnerables (Cornellis i Vandervoort, 2011 i 2013; Preuße, 2012). També es pot plantejar com un instrument de suport per realitzar un diagnòstic social més objectiu, si bé cal adaptar l'indicador a cada situació particular (Cornellis *et al.*, 2012).

## **5.2. Orígens històrics i evolució dels "reference budgets"**

Els RBs han estat construïts de diverses maneres al llarg de la història en diferents països. L'origen d'aquesta aproximació data de principis del segle XX al Regne Unit i als Estats Units com a mètode d'estudi de les condicions de vida de les famílies obreres sota el nom de "*budget studies*" (Bradshaw *et al.*, 1987; Fisher, 2007). Rowntree fou un dels pioners l'any 1901 a desenvolupar aquest enfocament quan determinà el nivell de pobresa a la ciutat de York (Anglaterra) a partir del llindar d'ingressos necessaris per mantenir l'eficiència física, basat en el desenvolupament d'una dieta adequada i altres necessitats (Rowntree, 2000). L'impacte del seu estudi ha influenciat històricament aquest enfocament, encara que ha evolucionat vers la inclusió d'altres necessitats, no només físiques, sinó també socials (Bradshaw, 2000; Fisher, 2007).

Al llarg dels darrers quaranta anys s'han desenvolupat tres o més RBs en cada un dels següents països europeus segons Storms *et al.* (2014): Alemanya, Bèlgica, Croàcia, Eslovènia, Finlàndia, Grècia, Irlanda, Països Baixos, Polònia, Portugal, Regne Unit, Romania i Suècia. També en altres països no europeus com Austràlia, Canadà, Noruega o Nova Zelanda (Borgeraas i Dahl, 2010; Fisher, 2007; Saunders, 1999). La

majoria d'aquests RBs, sota el nom de “*budget standards*”, s’han utilitzat per avaluar un adequat nivell de vida o com a mesura de la pobresa. Tanmateix, s’han creat des de perspectives metodològiques diferents, la qual cosa no permet establir una anàlisi comparativa. A partir del 2008 s’abandona el terme “*budget standard*” massa connotat normativament i s’empra el terme “*reference budgets*” (Storms *et al.*, 2014).

En el cas d’Espanya només trobem una sola referència en relació al desenvolupament d’aquest indicador. En el marc d’un projecte europeu, l’any 2009 es van elaborar RBs per a nou països: Àustria, Bèlgica, Bulgària, Espanya, Finlàndia, Alemanya, Irlanda, Suècia i Regne Unit (Warnaar i Luten, 2009)<sup>21</sup>. En el cas d’Espanya l’equip de treball responsable va ser ADICAE<sup>22</sup>. Es van crear RBs per a la ciutat de Madrid mitjançant l’ús de dades sobre la despesa familiar i també l’opinió d’experts, qüestionaris i grups de discussió amb ciutadans. En aquest cas, el propòsit era poder tenir una eina per a la gestió de l’economia domèstica (ADICAE, 2009). Tanmateix, aquest projecte també va partir de metodologies diferents per a cada país, de manera que els resultats obtinguts tampoc van ser comparables.

### **5.3. “Reference budgets” a Europa des d’un marc teòric i mètode comuns**

Com s’ha comentat, l’interès a nivell de les institucions europees pel potencial que pot oferir aquest indicador a l’hora d’orientar les polítiques socials i la mesura de la pobresa fa emergir la necessitat que els RBs siguin desenvolupats de manera comparable. Per aquest motiu, a partir de 2012, en el marc del projecte ImPRovE, es planteja un marc teòric i mètode comuns per a la construcció de RBs de manera comparable per a àrees altament urbanitzades corresponents a sis grans ciutats europees: Anvers, Atenes, Barcelona, Budapest, Helsinki i Milà.

En primer lloc, s’estandarditza el nivell de vida al qual fan referència els RBs que tal com s’ha presentat a la introducció ha de respondre al mínim de recursos necessaris per poder dur a terme el desenvolupament de les posicions i rols socials pertinents. D’aquesta manera els RBs es comprenen de la següent manera:

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<sup>21</sup> Projecte europeu sota el suport del programa PROGRESS de la Comissió Europea, 2008-2009.

<sup>22</sup> Asociación de Usuarios de Bancos, Cajas y Seguros.

“the aim is to find out how much income is needed for being able to reach a consumption pattern that corresponds to the minimum acceptable standard of living in terms of capabilities: what people can be or do. The purpose is clearly not to find out how people should spend such income, which would be ‘prescriptive’” (Storms *et al.*, 2013:5)<sup>23</sup>

D’aquesta manera i, des d’un marc normatiu, s’identifiquen una sèrie de posicions socials que les persones en el context europeu segons el *Charter of Fundamental Rights of the European Union* (2000) haurien de poder desenvolupar (Goedemé *et al.*, 2015b). La taula següent mostra aquestes posicions, les quals les contrastem amb la *Constitució espanyola* (1978) i l’*Estatut d’Autonomia de Catalunya* (2006).

Taula 1. Posicions socials en el marc europeu, espanyol i català.

Àmbits	Posicions socials identificades	<i>Charter</i> (2000)	<i>Constitució espanyola</i> (1978)	<i>Estatut d’Autonomia de Catalunya</i> (2006)
Àmbit familiar	Membre d’una família	Art.9	Art.32 i 39	Art.40 i Art. 17
Àmbit laboral	Treballador	Art.15 i 16	Art.35 i Art.7	Art.25
Àmbit educatiu	Estudiant	Art. 14.	Art. 27.	Art. 21 i Art. 44
Àmbit ciutadà	Membre d’associacions	Art.12 i Art.11	Art.22 i Art.36	Art.29
	Ciutadà	Art. 39-40, i diferents articles	Art.23, Art. 48 i Art.105.	Art.29

Font: Elaboració pròpia a partir de *Charter of Fundamental Rights of the European Union* (2000), *Constitució espanyola* (1978) i *Estatut d’Autonomia de Catalunya* (2006).

A partir d’aquest marc europeu, els autors esmentats desenvolupen una proposta de posicions socials per a diferents perfils: dona, home, nen de 10 anys i nena de 14 anys, la qual recollim a la taula següent. Així, doncs, donada la coincidència entre el

<sup>23</sup> En aquest sentit, aquesta proposta de Storms *et al.* (2013) es basa en l’aproximació d’Amartya Sen (1992, 2005), el qual planteja que els ingressos es comprenen com un mitjà per a un fi, és a dir, per assolir un nivell de vida acceptable en termes de capacitats, allò que les persones poden ser o fer. Des d’aquesta perspectiva, la pobresa no es defineix segons els ingressos o la falta de recursos materials, sinó en termes de fracàs en l’assoliment de les capacitats.

nostre marc autonòmic, el nacional i l' europeu podem assumir en aquesta recerca aquest mateix llistat predefinit de posicions socials com a punt de partida<sup>24</sup>.

Taula 2. Llistat de posicions socials predefinides.

<b>Dona</b>	<b>Home</b>
Membre d'una família (filla, mare, germana...) Treballadora Veïna Membre d'un sindicat Membre d'altres associacions Membre de la societat	Membre d'una família (fill, pare, germà...) Treballador Veí Membre d'un sindicat Membre d'altres associacions Membre de la societat
<b>Noia 14 anys</b>	<b>Nen 10 anys</b>
Membre d'una família (filla, germana, cosina...) Estudiant Veïna Membre d'altres associacions Membre de la societat	Membre d'una família (fill, germà, cosí...) Estudiant Veí Membre d'altres associacions Membre de la societat

Font: Basat en la proposta desenvolupada en el *Pilot project for the development of a common methodology on Reference Budgets* a partir del *Charter of Fundamental Rights of the European Union* (2000) (Goedemé *et al.*, 2015b).

En segon lloc, per operacionalitzar aquest nivell de vida acceptable es parteix de la teoria de les necessitats humanes de Doyal i Gough (1984, 1994). Aquests autors identifiquen dues 'necessitats bàsiques' universals que són requisits en totes les cultures: la salut física i l'autonomia. A partir d'aquí desenvolupen el concepte de 'necessitats intermèdies' que són aquelles que han de satisfer aquests principis universals. Per a la salut física de l'individu defineixen les següents: (1) alimentació adequada i aigua potable; (2) allotjaments que proporcionin protecció adequada; (3) ambient de treball segur; (4) entorn físic segur; (5) acció sanitària apropiada. I per a garantir l'autonomia: (6) seguretat en la infantesa; (7) relacions de primer grau significatives; (8) seguretat física; (9) seguretat econòmica; (10) ensenyament adequat. Així, doncs, aquestes necessitats intermèdies actuen de mediadores per assolir aquests principis universals.

<sup>24</sup> En el projecte ImPRovE no es va contrastar aquest marc de referència. Per aquest motiu, en la fase 2 del treball empíric de l'Estudi 1 aquestes posicions socials sí que seran contrastades mitjançant grups de discussió a Catalunya en àrees densament poblades.

En el projecte ImPRovE s'adapta aquest model teòric al context europeu i es defineixen les següents necessitats intermèdies que s'han de satisfer per tal que les persones puguin participar plenament a la societat, les quals són traduïdes a cistelles de béns i serveis (Storms *et al.*, 2013): (1) alimentació saludable; (2) roba adequada; (3) descans; (4) lleure; (5) higiene personal; (6) assistència sanitària; (7) relacions socials significatives; (8) benestar en la infantesa; (9) mobilitat; (10) habitatge adequat. A continuació s'exposa la funció que han de complir aquestes cistelles d'acord amb la necessitat intermèdia<sup>25</sup> que representen segons Goedemé *et al.*(2015a):

- *Alimentació saludable*: conté els béns i serveis per garantir una bona salut i prevenir malalties.
- *Roba adequada*: conté els elements necessaris per oferir protecció enfront de les condicions climàtiques i la creació d'identitat.
- *Descans i lleure*: per assolir una adequada salut física, social i emocional.
- *Higiene personal*: per garantir una higiene personal, tant per a la prevenció d'infeccions, com a nivell psicològic i per a la inclusió social.
- *Assistència sanitària*: per mantenir una bona salut.
- *Manteniment de relacions socials significatives*: per poder desenvolupar relacions socials per a una salut emocional i el desenvolupament de la identitat.
- *Benestar en la infantesa*<sup>26</sup>: per al desenvolupament cognitiu, social i emocional dels infants i la promoció de la seva autonomia i personalitat.
- *Mobilitat*: per poder desenvolupar les diferents posicions socials.
- *Habitatge adequat*: per sentir-se segur i protegit i per a la prevenció de malalties.

Així, doncs, aquestes necessitats intermèdies s'associen a unes funcions que es concreten en un llistat de béns i serveis, als quals se'ls hi assigna una vida útil i uns preus<sup>27</sup>.

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<sup>25</sup> En el projecte ImPRovE no es va contrastar aquest marc de referència. Per aquest motiu, en la fase 2 del treball empíric de l'Estudi 1 aquestes necessitats intermèdies sí que seran contrastades mitjançant grups de discussió a Catalunya en àrees densament poblades.

<sup>26</sup> En anglès utilitzarem 'Safety in childhood', d'acord amb la terminologia del projecte ImPRovE. En català hem considerat el concepte 'benestar' com a traducció més idònia enlloc de 'seguretat', en el sentit que defineix una situació en què es troben satisfetes les necessitats de la vida i, per tant, representa millor el que volem expressar.

<sup>27</sup> Aquest procés s'exposarà a la fase 1 de l'Estudi 1.



En tercer lloc, s'estandarditza el tipus de població a la qual fan referència els RBs. Seguint la teoria de Doyal i Gough (1994) la salut física i l'autonomia són dos grans condicionants que poden modificar les necessitats intermèdies. Per aquest motiu, es desenvolupen els RBs per adults i infants en bon estat de salut, ben informats i amb competències i autonomia suficient per poder desenvolupar la seva vida quotidiana. Cal tenir en compte que amb l'assumpció d'aquest supòsit, els RBs obtinguts no seran generalitzables per al conjunt de la població. Per tant, aquest és un element a considerar a l'hora d'interpretar-ne els resultats. Així, doncs, els RBs són construïts pels quatre hipotètics tipus de família: (1) home/dona solter/a en edat activa; (2) parella composta d'home i dona en edat activa sense fills; (3) dona en edat activa amb un fill de 10 anys al seu càrrec i (4) parella composta d'home i dona en edat activa amb dos fills (nen de 10 anys i noia de 14 anys). L'avantatge de començar a desgranar els béns i serveis per aquests perfils bàsics (home, dona, nen de 10 anys i nena de 14 anys) és que permet desenvolupar més endavant, si s'escau, altres tipus de combinacions familiars.

Per últim, s'estandarditza l'àmbit geogràfic de referència pel qual els RBs són elaborats: àrees altament urbanitzades amb una àmplia xarxa de transport públic corresponents a sis grans ciutats europees: Anvers (Bèlgica), Atenes (Grècia), Barcelona (Espanya), Budapest (Hongria), Helsinki (Finlàndia) i Milà (Itàlia).

En conclusió, la comparabilitat dels RBs en aquesta recerca s'ha garantit a través d'uns procediments estandarditzats que han dut a terme els diferents equips d'investigació col·laboradors a cada país, de manera que les diferències entre el contingut dels RBs a cada territori només poden ser degudes a variacions en l'àmbit institucional, les condicions climatològiques o geogràfiques, els valors culturals propis de cada context i la disponibilitat, qualitat o preu dels diferents béns i serveis que componen els RBs (Goedemé *et al.*, 2015a). En conseqüència, aquest és el model que hem seguit per construir els RBs en el nostre context.

## **PART III: METODOLOGIA DEL TREBALL EMPÍRIC**

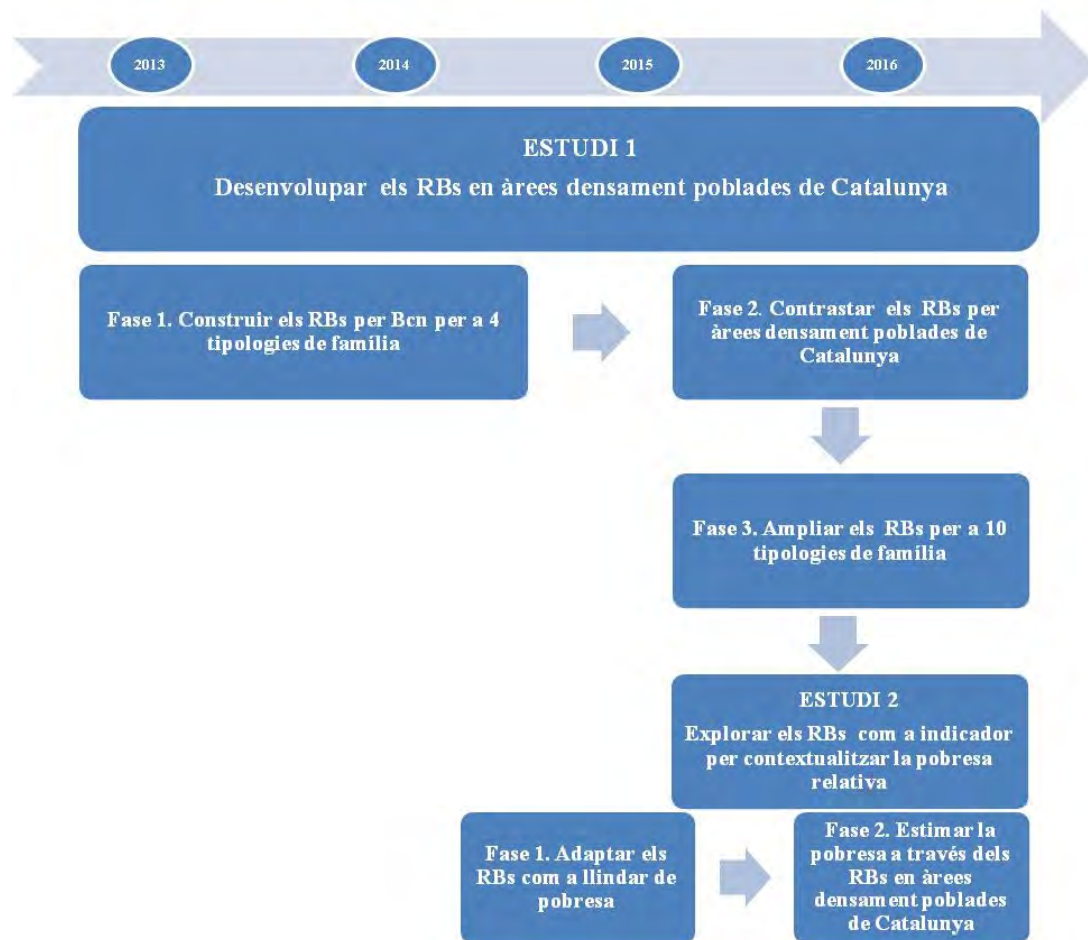
### **1. Presentació del treball empíric**

Presentem aquí el treball empíric que tal com s'ha explicat a la Introducció es divideix en dos estudis, els quals integren mètodes qualitius i quantitius. El primer dividit en tres fases i el segon en dues. A la Figura 1 sintetitzem la seqüència del treball empíric.

El primer estudi s'inicia l'any 2013 en el marc de la col·laboració establerta del nostre grup de recerca PSITIC amb el projecte europeu ImPRovE. La proposta és construir RBs per a 4 tipologies de família per a Barcelona des d'una base teòrica i metodològica comuna als diferents països participants (estudi 1, fase 1). A partir del 2015 un cop obtinguts els resultats d'aquest projecte i observades algunes àrees de millora de la perspectiva adoptada, ens hem plantejat: *contrastar els RBs per àrees densament poblades a Catalunya* (estudi 1, fase 2) i *ampliar els RBs per a 10 tipologies de família* (estudi 1, fase 3).

A partir d'aquí hem plantejat un segon estudi per *explorar els pressupostos de referència com a indicador per contextualitzar la pobresa relativa en àrees densament poblades de Catalunya*. En primer lloc, s'han adaptat els RBs com a llindar de pobresa (estudi 2, fase 1). En segon, s'ha estimat la pobresa a través dels RBs en àrees densament poblades de Catalunya mitjançant l'EU-SILC (estudi 2, fase 2).

Figura 1. Seqüència del treball empíric.



Font: Elaboració pròpia.

## **2. ESTUDI 1: Desenvolupar els RBs en àrees densament poblades de Catalunya**

### **2.1. Estudi 1. Fase 1. Construir els RBs per a Barcelona**

En el marc del projecte ImPROvE s'han construït per primera vegada RBs de manera comparable per àrees altament urbanitzades corresponents a sis grans ciutats europees: Anvers, Atenes, Barcelona, Budapest, Helsinki i Milà. Les cistelles de béns i serveis es van desenvolupar per a 4 tipologies de família: (1) home/dona solter/a en edat activa; (2) parella composta d'home i dona en edat activa sense fills; (3) dona en edat activa amb un fill de 10 anys al seu càrrec i (4) parella composta d'home i dona en edat activa amb dos fills (nen de 10 anys i noia de 14 anys).

Per construir les cistelles de béns i serveis es va començar des d'una "base comuna" sostinguda sobre guies internacionals i investigacions prèvies sobre els RBs a Bèlgica. D'aquesta manera, a partir d'aquí cada país va realitzar adaptacions en funció del seu context institucional, cultural o social, i condicions climàtiques o geogràfiques específiques per constituir els RBs propis seguint les següents fases: (1) adaptació de la base comuna al context local, és a dir, comprovar la inclusió de cada bé i servei i la seva justificació; (2) comprovació de l'acceptabilitat de les diferents cistelles mitjançant grups de discussió; (3) assignació de preus als diferents productes i serveis i (4) revisió per part de l'equip coordinador dels passos seguits i resultats obtinguts. Aquest procés va quedar enregistrat en documents d'Excel harmonitzats per a cada una de les cistelles, a excepció dels costos de l'habitatge que van ser calculats separatament utilitzant un mètode estadístic per l'equip coordinador del CSB-UA (Goedemé *et al.*, 2015a).

A continuació, es descriu el procés seguit per desenvolupar els RBs a Barcelona com a ciutat de referència d'acord amb els criteris establerts en aquest projecte (Goedemé *et al.*, 2015a; Storms *et al.*, 2013), detallant la mostra, els instruments utilitzats, els procediments i l'anàlisi de la informació, si s'escau, en cada una de les fases.

## **Adaptació de les diferents cistelles de béns i serveis al context local**

Per adaptar i justificar la inclusió dels diferents béns i serveis en el nostre context per a les quatre tipologies de família es va procedir a fer una recollida intensiva d'informació de cada un dels àmbits de necessitats.

### *Instruments i fonts d'informació, procediments i anàlisi de la informació*

En primer lloc, es van buscar documents marc, és a dir, guies o regulacions oficials específiques existents de cada àmbit de necessitat a nivell de l'estat espanyol i del context autonòmic català, així com també a nivell més local de l'àrea de la ciutat de Barcelona.

En segon lloc i, particularment, en els àmbits on no es disposava de guies oficials que regulin el mínim de béns i serveis necessaris o bé quan es va fer constar certa ambigüitat en aquestes normatives, es va procedir a fer entrevistes exploratòries a experts. Ens vam posar en contacte amb experts, tant acadèmics com professionals en els àmbits de necessitat concrets on calien criteris i orientacions per adaptar el contingut de les cistelles al nostre context. Es va demanar de concertar una entrevista mitjançant una carta via correu electrònic en què se'ls va presentar el projecte; el contingut i documentació relacionada amb l'àmbit concret de necessitat per tal (1) d'adequar el llistat de béns i serveis que figuraven a la cistella belga pel nostre context i (2) donar-nos orientacions sobre l'existència de normatives, regulacions i altres referències més locals - documents científics, altres estudis o estadístiques – que ens ajudessin a justificar el contingut i els components de cada una de les cistelles.

En total van participar 16 experts entre 2013 i 2014 i, en quasi tots els casos, l'entrevista es va realitzar presencialment. En cas que no fos possible es va fer un intercanvi d'informació via correu electrònic o telefònicament. Els experts participants van ser: dues nutricionistes per l'àmbit de l'alimentació saludable, Sra. Marta Anguera i Dra. Elena Carrillo, de la Facultat de Ciències de la Salut Blanquerna-URL (FCSB-URL); cinc educadors i/o treballadors socials de diferents entitats socials dedicades a l'atenció de persones de col·lectius vulnerables (adults i infants) per determinar criteris sobre la roba, Sr. David Vázquez i Sra. Maria Peña de l'Obra Social de Santa Lluïsa de Marillac, Sra. Olga Valsells de la Llar de Pau, Sra. Isabel Bugés de la Residència La Immaculada Centres Residencials d'Acció Educativa i Sra. Pilar Jiménez de la Residència Sol Ponent Obra Beneficoassistencial; Dra. Emilia Sánchez Ruiz de la FCSB-URL pel tema de la higiene personal i l'assistència sanitària; un fisioterapeuta

per l'àmbit del descans, Sr. Lluís Puig de la FCSB-URL; un expert en l'àrea dels estudis sobre l'oci, el lleure i la cultura de la Generalitat de Catalunya, Sr. Ramon Castells; cinc experts en l'àmbit del benestar en la infantesa: Dr. Jesús Vilar expert en educació i drets dels infants, Sr. Francesc Garreta expert en temes de lleure, ambdós de la Facultat d'Educació Social i Treball Social Pere Tarrés-URL, Dr. Eduard Longás, expert en educació i prevenció de riscos escolars, Dr. Miquel Àngel Prats, expert en educació i noves tecnologies de la informació i la comunicació, ambdós de la FPCEEB-URL i Sra. Imma Marín directora de l'empresa Marinva, especialitzada en educació, comunicació i formació a través del joc i, finalment, un advocat expert en temes d'habitatge, Sr. Germán Almendros. Aquesta última necessitat, tot i que va ser calculada per l'equip coordinador, també va requerir una cerca d'informació sobre els criteris de qualitat dels habitatges en el nostre context i dades estadístiques locals disponibles sobre aquest àmbit. La Taula 3 recull les fonts d'informació finalment consultades per a cadascuna de les cistelles de béns i serveis.

Taula 3. Fonts d'informació per adaptar les diferents cistelles de béns i serveis al context local.

Cistelles de béns i serveis	Guies oficials	Experts	Literatura científica	Estadístiques	Grups de discussió
Alimentació saludable	×	×	×		×
Roba adequada	×	×	×	×	×
Descans i lleure		×	×	×	×
Higiene personal		×			×
Assistència sanitària		×		×	×
Relacions socials significatives	×			×	×
Benestar en la infantesa	×	×	×	×	×
Mobilitat				×	×
Habitatge	×	×	×	×	

Font: Elaboració pròpia. Respecte l'habitatge també s'ha consultat als grups de discussió realitzats en àrees densament poblades de Catalunya en la 2a fase de l'Estudi 1.

Finalment, en base a la síntesi de tota aquesta informació recollida a través d'aquests canals es va adaptar i justificar el contingut de les cistelles de béns i serveis. Com indica la taula anterior, per cada àmbit s'han triangulat diferents fonts d'informació. Seguidament, el contingut de les cistelles va ser contrastat en grups de discussió, tal com s'explica a continuació.

## Acceptabilitat i ajustament de les cistelles

Per tal de comprovar l'acceptabilitat sobre la composició de les cistelles i la seva viabilitat en el nostre context es van organitzar tres grups de discussió (*focus groups*) amb ciutadans per tal de trobar arguments que justifiquessin la inclusió o no dels diferents ítems, així com també investigar sobre les pautes de consum en el nostre territori per poder orientar la següent fase d'assignació de preus en aquests béns i serveis.

En aquest tipus de recerca les tècniques qualitatives ens ajuden a captar millor les convencions culturals locals per completar i contrastar el coneixement sobre els mínims recursos necessaris per assolir el nivell de vida determinat. Així, doncs, el paper dels participants en aquests grups és negociar, argumentar i consensuar aquests recursos essencials (Walker, 1987; Storms *et al.*, 2013).

### *Criteris de selecció de la mostra i protocol de reclutament*

Seguint les indicacions per desenvolupar aquests grups acordades pels diferents equips de recerca participants en el projecte, es van organitzar 3 grups de discussió a l'àrea de Barcelona a través d'organitzacions socials públiques i privades. És van contactar les organitzacions mitjançant una carta via correu electrònic on s'explicava el projecte i es demanava col·laborar voluntàriament en la investigació.

Tres organitzacions socials van acceptar col·laborar: una escola de l'àrea metropolitana, una entitat del tercer sector i unitat dels serveis socials de Barcelona<sup>28</sup>. Un cop obtingut el permís dels centres per organitzar aquests grups, la mateixa entitat va triar els participants en base als criteris establerts a la recerca: adults homes o dones de 30 a 50 anys, amb com a mínim un fill al seu càrrec en famílies biparentals o monoparentals i de diferents perfils socioeconòmics segons la seva professió i situació en relació al treball. Formar grups heterogenis facilita la confluència de diferents punts de vista que resulta en una discussió més rica, vàlida i representativa de la societat, d'acord amb el procediment realitzat en recerques anteriors sobre aquesta temàtica (Vranken, 2010; Goedemé *et al.*, 2015a).

El mes de desembre de 2013 es va realitzar el primer grup, el qual va servir de prova. Els altres dos tingueren lloc el mes de març de 2014. Tots els participants van ser

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<sup>28</sup> Les entitats col·laboradores en l'organització dels grups de discussió van ser: la Fundació l'Esperança de Barcelona, Salesians Sant Vicenç dels Horts i el Centre Serveis Socials Baix Guinardó - Can Baró, Barcelona.

informatats de la recerca mitjançant un full informatiu i es va demanar també el seu consentiment informat, d'acord amb els criteris ètics establerts en el projecte ImPRovE.

### *Composició final de la mostra dels grups de discussió projecte ImPRovE*

Es van aconseguir formar els 3 grups de discussió compostats de 5 a 8 participants amb una mostra total de 20 participants. Un 65% dels participants eren nascuts a Catalunya i un 55% residents a Barcelona, la majoria dones d'entre 50 i 27 anys. Un 55% dels participants vivien en parella i fills a càrrec d'entre 2 i 22 anys en llars biparentals. En relació a la situació laboral només un 45% estaven ocupats i el nivell màxim d'estudis assolits predominant era secundària postobligatòria.

Per tal de poder classificar els participants segons el seu origen de classe utilitzem el model proposat a l'*Enquesta a la Joventut de Catalunya 2012 (EJC 2012)* basat en la Classificació Socioeconòmica Europea (ESeC), la qual té el seu origen en l'esquema relacional de classificació de classes socials d'Erikson, Goldthorpe i Portocarrero (EGP) (Serracant-Melendres (coord.), 2013).

La ESeC planteja un model de deu categories bàsiques de classe<sup>29</sup> que en l'informe de Serracant-Melendres (2013) reagrupen en quatre de la següent manera: (1) Experta (categories 1 (professionals de nivell alt) i 2 de la ESeC (professionals de nivell baix)); (2) Intermèdia i/o mitjana (categories 3,4, 5, 6 i 7 de la ESeC); (3) Obrera i/o mitjana-baixa (categories 8 i 9 de la ESeC) i (4) No ocupats, exclosos del mercat de treball o aturats de llarga durada, també anomenada baixa-precària (categoria 10).

Així, doncs, hem fet una adaptació del model de Serracant-Melendres (2013) per classificar els participants en cinc categories: (1) classe alta (professionals de nivell alt); (2) classe mitjana-alta (professionals de nivell baix); (3) mitjana (intermèdia); (4) mitjana-baixa (obrer) i (5) baixa-precària.

A les taules següents es mostra que la distribució dels participants segons el seu origen de classe va ser molt equilibrada: un 55% dels participants de classe baixa, un 40% de classe mitjana o mitjana-alta i un 5% de classe alta. Pel que fa al criteri d'heterogeneïtat d'orígens socials dins de cada un dels grups podem dir que es

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<sup>29</sup> Classificació ESeC, basat en Requena, Radl i Salazar (2011): Categoria 1: grans empresaris, directius i professionals de nivell alt ("higher salariat"); Categoria 2: directius i professionals de nivell baix ("lower salariat"); Categoria 3: empleats de coll blanc de nivell alt; Categoria 4: petits propietaris i autònoms no agraris (ocupacions no professionals, no agrícoles); Categoria 5: treballadors autònoms agraris; Categoria 6: supervisors i tècnics de rang inferior; Categoria 7: treballadors dels serveis i del comerç del rang inferior; Categoria 8: treballadors manuals qualificats; Categoria 9: treballadors no qualificats; Categoria 10: exclosos del mercat de treball i/o aturats de llarga durada.



compleix, a excepció del grup FGA3 on hi ha un clar predomini de participants de classe baixa, a causa del tipus d'accés a la mostra.

Taula 4. Classe social dels participants adults, 2013-2014.

Classe social	Adults	
	Freqüència	%
Alta	1	5
Mitjana-alta	4	20
Mitjana	4	20
Mitjana-baixa	0	0
Baixa	11	55
<b>Total</b>	<b>20</b>	<b>100</b>

Font: Elaboració pròpia a partir del qüestionari als participants.

Taula 5. Distribució dels adults en cada un dels grups de discussió segons l'origen de classe, 2013-2014.

Classe social	FGA1		FGA2		FGA3	
	Freqüència	%	Freqüència	%	Freqüència	%
Alta	1	14	0	0	0	0
Mitjana -alta	1	14	3	60	0	0
Mitjana	3	43	0	0	1	13
Mitjana - baixa	0	0	0	0	0	0
Baixa	2	29	2	40	7	88
<b>Total</b>	<b>7</b>	<b>100</b>	<b>5</b>	<b>100</b>	<b>8</b>	<b>100</b>

Font: Elaboració pròpia a partir del qüestionari als participants.

### *Instrument, fonts d'informació i desenvolupament dels grups de discussió*

El desenvolupament de les sessions va ser conduït per un moderador i assistent del mateix equip de recerca amb una durada d'uns 90 minuts i a mode de cortesia es va oferir als participants un refrigeri i begudes. La sessió es va estructurar seguint el següent ordre: (1) presentació de la recerca i dels participants, inclosos moderador i assistent; completar la fitxa sociodemogràfica i els consentiments informats per part dels participants; (2) desenvolupament del guió i discussió de materials i (3) conclusions i tancament de la sessió amb els corresponents agraïments.

El guió va ser acordat per tots els països i traduït en els idiomes locals amb el següent contingut. En primer lloc, es va presentar la llar de referència formada per 2 adults i 2 infants, un nen de 10 anys i una nena de 14 anys, en bon estat de salut, que viuen a la ciutat de Barcelona i amb les competències i informació suficients per desenvolupar-se en la vida quotidiana. Certament, la visió dels participants pot estar

influenciada per la seva experiència personal, per això se'ls va proposar de partir d'una família de referència estandarditzada, ja que s'ha vist com una estratègia efectiva en altres recerques sobre la temàtica perquè ajuda a focalitzar els participants en aquella situació hipotètica i fugir de les seves preferències personals (Devuyst, Storms i Penne, 2014).

En segon lloc, la discussió del contingut específic de cadascuna de les cistelles en relació a la família de referència. És a dir, per cada cistella es va exposar el seu contingut i es va demanar als participants d'aportar arguments per justificar o no la inclusió dels diferents béns i serveis per assolir el nivell de vida acceptable, entès com aquell que permet el desenvolupament de les posicions socials, tal com s'ha explicat anteriorment.

Per últim, de cada cistella també es van preguntar les pautes habituals de consum per a l'obtenció dels diferents béns i serveis per tal de tenir aquesta informació a l'hora d'assignar-los el cost, fase que s'explica seguidament. Cal destacar que no hi van haver incidències en el desenvolupament dels grups de discussió. Tanmateix, i donades les restriccions de temps, es va detectar la impossibilitat de tractar detalladament totes les cistelles de béns i serveis en tots els grups.

Taula 6. Guió dels temes desenvolupats en els grups de discussió, 2013-2014.

<b>1) Alimentació saludable</b>
<ul style="list-style-type: none"> <li>▪ Acceptabilitat de la proposta de menú per a una alimentació saludable</li> <li>▪ Activitat física</li> <li>▪ Pautes de consum</li> </ul>
<b>2) Roba adequada</b>
<ul style="list-style-type: none"> <li>▪ Acceptabilitat de les peces de vestir</li> <li>▪ Acceptabilitat productes i serveis per al manteniment de la roba</li> <li>▪ Pautes de consum</li> </ul>
<b>3) Descans i lleure</b>
<ul style="list-style-type: none"> <li>▪ Acceptabilitat béns i serveis inclosos a la cistella</li> <li>▪ Pautes de consum</li> </ul>
<b>4) Higiene personal</b>
<ul style="list-style-type: none"> <li>▪ Acceptabilitat béns i serveis inclosos a la cistella</li> <li>▪ Pautes de consum</li> </ul>
<b>5) Assistència sanitària</b>
<ul style="list-style-type: none"> <li>▪ Acceptabilitat béns i serveis inclosos a la cistella</li> <li>▪ Pautes de consum</li> </ul>
<b>6) Relacions socials significatives</b>
<ul style="list-style-type: none"> <li>▪ Acceptabilitat béns i serveis inclosos a la cistella</li> <li>▪ Pautes de consum</li> </ul>
<b>7) Benestar en la infantesa</b>
<ul style="list-style-type: none"> <li>▪ Acceptabilitat béns i serveis inclosos a la cistella segons l'edat de l'infant</li> <li>▪ Pautes de consum</li> </ul>
<b>8) Mobilitat</b>
<ul style="list-style-type: none"> <li>▪ Acceptabilitat béns i serveis inclosos a la cistella i</li> <li>▪ Pautes de consum</li> </ul>

### *Anàlisi de la informació*

Es va utilitzar la gravació de veu per poder enregistrar la discussió. La informació obtinguda dels diferents temes va ser resumida i ordenada temàticament d'acord amb el contingut de cada una de les cistelles i es va utilitzar per ajustar i justificar alguns ítems on es feia palès el buit de normatives o criteris d'expertesa per determinar el número d'ítems i la seva qualitat. En la fase següent de l'Estudi 1 s'aprofundeix en aquesta informació mitjançant una transcripció de la informació i una anàlisi de contingut qualitativa de tots els grups de discussió realitzats.

### **L'assignació de preus als diferents béns i serveis**

#### *Instruments, fonts d'informació i procediments*

L'assignació de preus als béns i serveis inclosos acabarà il·lustrant els RBs pels diferents àmbits de necessitats. Aquest procediment també va seguir un procés comú per tots els països (veure Storms *et al.*, 2013): (1) seleccionar un mínim de proveïdors d'acord amb les indicacions dels experts sobre els criteris de qualitat a tenir en compte i l'opinió dels grups de discussió; (2) escollir l'ítem concret i el preu associat i (3) calcular el preu per mes tenint en compte la vida útil del producte. Aquest procés es va dur a terme durant la primera meitat del 2014, exceptuant la cistella de l'alimentació que es va fer el juliol de 2013.

Per cada cistella el procediment va ser el mateix seleccionant els preus dels béns i serveis a través de les pàgines web dels proveïdors específics escollits per cada cistella. S'elegí l'opció més d'acord amb la funció assignada, sense tenir en compte descomptes o rebaixes. Així mateix, i per tal de garantir la comparabilitat entre països i respectar certa llibertat d'elecció a les famílies, es va establir per cada cistella un "preu llindar" (p.e. en el cas de la roba escollir la tercera samarreta més barata d'una certa qualitat). Només en el cas d'activitats i serveis on es feia difícil conèixer el preu exacte donada la diversitat d'opcions, es va recórrer a enquestes per estimar el mínim pressupost necessari per invertir en aquestes necessitats (p.e. vacances, cinema).

Finalment, per cada tipus de família, el preu de cada producte es va multiplicar per la quantitat mensual requerida i es va dividir per la seva vida útil comptabilitzada en mesos per obtenir el preu mensual. Es va assumir la mateixa vida útil en tots els països, segons l'experiència prèvia de recerca belga, a excepció que hi hagués informació local que indiqués algun canvi en aquest sentit. La recomanació metodològica que es va fer

des del projecte es poder ajustar els preus de les diferents cistelles anualment mitjançant l'índex de preus al consum (IPC) per cada grup de productes. Però, això té cert risc ja que l'índex es calcula sobre el nivell de consum mitjà, mentre que els béns i serveis inclosos dins els RBs parteixen de preus més baixos. També es va suggerir revisar els RBs cada cinc anys per actualitzar-ne el seu contingut donats els canvis que es produeixen a la nostra societat (Storms *et al.*, 2013).

### **Revisió del procés i resultats obtinguts**

Un cop construïts els RBs a cada territori, el procés va finalitzar amb la revisió per part de l'equip coordinador, el qual va comprovar que totes les adaptacions realitzades de les cistelles al context local quedessin prou justificades. En cas que hi hagués elements a clarificar va fer esmenes als equips locals per tal que afegissin informació en aquest sentit. A més, durant tot el procés de recerca els diferents equips d'investigadors es van reunir tant presencialment com de manera virtual per resoldre dubtes sobre el procés, posar en comú criteris i procediments. Aquests elements de coordinació han donat consistència i transparència al procés de recerca.

Tanmateix, podem identificar algunes àrees de millora d'aquesta fase senyalades a Goedemé *et al.* (2015a): (a) cal documentar més extensament les pautes de consum i l'assignació de preus per tal de poder quantificar els béns i serveis inclosos a les "cistelles"; (b) és necessari realitzar més grups de discussió per generar més consens entorn dels béns i serveis inclosos a les "cistelles", especialment, quan es disposa de menys documentació científica o de guies oficials; (c) la perspectiva comparada adoptada ha imposat només incloure variacions degudes al context geogràfic, cultural o institucional i, per tant, cal assegurar una major adaptació dels RBs al context local; (d) el projecte només ha tingut en compte quatre tipologies de família. Per tant, per extrapol·lar els resultats al conjunt de la població i mesurar la pobresa o guiar les accions socioeducatives caldria incloure més variabilitat en les situacions de referència. Així, doncs, algunes d'aquestes àrees de millora les hem volgut abordar en les següents fases de l'Estudi 1.

## **2.2. Estudi 1. Fase 2. Contrastar els RBs en àrees densament poblades de Catalunya**

En aquesta fase Els RBs construïts en el marc del projecte ImPRovE i que tenen com a ciutat de referència la ciutat de Barcelona són contrastats per àrees densament poblades de Catalunya mitjançant grups de discussió amb adults i infants. Aquest procés de contrast en altres zones és utilitzat en recerques sobre aquesta temàtica ja que habitualment els RBs són construïts a nivell de ciutats (Bradshaw *et al.*, 2008). Ens plantegem les següents qüestions:

- (a) Conèixer el consens social entorn les posicions socials i la justificació de les necessitats intermèdies en aquest territori.
- (b) Contrastar més arguments per a la inclusió dels béns i serveis de les diferents cistelles en aquestes àrees.
- (c) Observar com les variables que defineixen la família de referència (situació laboral, la població de residència, l'edat, el sexe o l'estat de salut) influeixen en la composició de les cistelles de béns i serveis.
- (d) Contrastar les pautes de consum en aquest territori.

A més, amb aquesta fase considerem també la visió dels infants, un element que no ha estat gaire explorat en el marc de les recerques sobre RBs. D'acord amb la *Convenció sobre els Drets de l'Infant* (United Nations General Assembly, 1989) i la Comissió Europea (2013) escoltar els infants és important per comprendre millor les seves necessitats i generar accions d'acord amb aquestes.

Trobem escasses referències sobre la consulta als infants en aquest camp, essent l'aproximació a través d'enquesta a adolescents la més coneguda (Piachaud, 1982). Aproximar-nos a l'opinió dels infants de diferents entorns socials mitjançant grups de discussió és un punt innovador del projecte que ens proporciona complementar els arguments despleats en els grups d'adults, així com justificar millor les seves necessitats i els béns i serveis per al desenvolupament d'un nivell de vida acceptable.

### **Procediment: reclutament dels participants**

Els passos que s'han seguit per al reclutament dels participants han estat els següents:

1. Es va sol·licitar la col·laboració voluntària de centres educatius públics, privats i/o concertats o entitats de lleure de la província de Barcelona mitjançant una carta explicativa del projecte i les condicions de col·laboració.
2. Un cop es va obtenir el permís de la direcció del centre o entitat per accedir a la mostra<sup>30</sup> (Annex 1), es va acordar directament amb la persona de contacte els dies, franges horàries i sales per realitzar els grups de discussió.
3. La persona de contacte va seleccionar els participants d'acord amb els criteris que s'exposen en el següent apartat. També va proporcionar els fulls informatius on es demanava la col·laboració voluntària i els consentiments informats als participants (veure Annexos 2 i 3). Un cop acceptada la seva participació mitjançant la signatura del consentiment informat es va constituir el grup a cada entitat. També a tots els participants es va demanar d'omplir unes breus fitxes sociodemogràfiques (veure Annexos 4 i 5).

### **Mostra de participants en els grups de discussió**

En aquest apartat detallem, el criteris per a la selecció de la mostra de participants en els grups de discussió i presentem la mostra finalment aconseguida.

#### *Criteris per a la selecció de la mostra*

El mostreig es va realitzar de manera intencional (Forner i Latorre, 1996), d'acord amb les següents característiques sociodemogràfiques per escollir els participants i el criteri d'ubicació territorial dels grups. Tanmateix, la mostra resultant ha vingut condicionada pel mateix accés a les famílies i adolescents, el qual ha estat mediat en tots els casos per escoles, entitats socials i persones col·laboradores, tal com s'ha explicat en l'anterior punt.

#### (1) Perfil sociodemogràfic dels participants:

##### Característiques dels adults:

1. Adults: homes o dones entre 30 i 55 anys aprox. que viuen en zones densament poblades a Catalunya.

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<sup>30</sup> Les entitats col·laboradores en l'organització d'aquests grups de discussió van ser: Esplai Estel (Barcelona), Fundació Main (Sabadell), Fundació Marianao (Sant Boi de Llobregat) i Escola Thau Institució Cultural del CIC (Sant Cugat del Vallès).

2. Adults amb com a mínim 1 fill entre 8 i 16 anys, ja sigui en famílies biparentals i/o monoparentals.
3. Adults de diferents perfils socioeconòmics: baix (p.e. 3 persones), mig (p.e. 3 persones) i alt (p.e. 2 persones) per grup, segons la seva professió o situació en relació al treball (ocupats o aturats). És a dir, a cada grup ens interessava trobar persones de diferents perfils per origen de classe.
4. Persones amb criteris i opinió pròpia per poder aportar informació rellevant a la investigació, així com han de tenir bona predisposició i facilitat per interactuar en grup.
5. Persones amb bon estat de salut. Saber l'estat de salut dels participants és important en aquesta recerca, ja que tenir dificultats en aquest àmbit pot esbiaixar la concepció sobre els mínims recursos necessaris per assolir un nivell de vida acceptable.

#### Característiques dels joves adolescents:

1. Nois i noies de 3r o 4t d'ESO (de 14 a 16 anys aprox.). Sent conscients de la complexitat de la temàtica i d'acord amb la literatura, hem seleccionat joves de 14 a 16 anys ja que és el moment més adequat per discutir les qüestions reflexives que ens plantejem en aquesta fase. També, segons Krueger i Casey (2000), els grups en aquestes edats poden ser mixtos i menys difícils de gestionar. A més, en aquesta edat també pot ser fàcil recordar l'etapa primària i, per tant, discutir també les necessitats dels infants en aquest període, les quals també són considerades en l'indicador.
2. Adolescents que visquin en famílies biparentals i/o monoparentals en zones densament poblades a Catalunya.
3. Joves que viuen en famílies amb perfils socioeconòmics diversos: perfil socioeconòmic baix (3 persones), mig (3 persones) i alt (2 persones) per grup, segons la professió i la situació en relació al treball dels seus pares (ocupats o aturats). També buscàvem una composició mixta dels grups com en el cas dels adults.
4. Els nois i noies que formin part dels grups de discussió han de tenir criteris i opinió pròpia per poder aportar informació rellevant a la investigació, així com han de tenir bona predisposició i facilitat per interactuar en grup.
5. Persones amb bon estat de salut.

## (2) Ubicació territorial dels grups de discussió:

S'ha determinat la ubicació territorial dels grups de discussió d'acord amb la distribució de la població a Catalunya, en la mesura del possible en funció de les facilitats d'accés al camp.

La població de Catalunya es concentra majoritàriament en zones densament poblades segons dades de l'any 2015 de l'Institut d'Estadística de Catalunya. Un 54% dels habitants viuen en municipis de més de 50.000 habitants, distribuïts en només 23 municipis dels 947 de Catalunya (Idescat 2016a i 2016b). Des de la mateixa font podem calcular que un 36% es concentren en municipis intermedis de 50.000 a 5.001 habitants i que un 10% viuen en municipis de 5.000 o menys habitants<sup>31</sup>.

La província de Barcelona és el territori més poblat i un 65% de la seva població es concentra en municipis de més de 50.000 habitants. Concretament, en 19 dels municipis: la ciutat de Barcelona, 10 municipis de l'Àrea Metropolitana de Barcelona (AMB) i 8 municipis no pertanyents a l'AMB (INE, 2016a; Idescat, 2016c).

Així, doncs, s'ha intentat configurar la mostra dels grups de discussió responnent a aquesta distribució de la població. Per tant, hem realitzat els grups de discussió a la província de Barcelona, ja que és el territori de Catalunya que concentra més municipis densament poblats. Justament també és en aquestes àrees on la desigualtat i les situacions de pobresa i exclusió es fan més paleses (Sarasa, Porcel, Navarro-Varas i Thiers, 2015).

### *Composició final de la mostra de participants en els grups de discussió*

S'han realitzat un total de 7 grups de discussió en poblacions situades en àrees densament poblades de Catalunya. S'han organitzat 3 grups amb adults amb fills al seu càrrec i 4 grups amb joves adolescents amb la següent distribució territorial tal com es resumeix a la taula següent.

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<sup>31</sup> Ens basem en la classificació de la variable grau d'urbanització (DB100) de l'*European Survey on Income and Living Conditions* (EU-SILC) d'Eurostat: àrees densament poblades (municipis de més de 50.000 habitants i una densitat igual o superior a 1.500 habitants per km<sup>2</sup>); àrees intermèdies (municipis amb menys de 50.000 habitants i més de 5.000 i una densitat entre 1.499 i 300 habitants per km<sup>2</sup>) i àrees amb densitat baixa (municipis amb menys de 5.000 habitants i una densitat menor de 300 habitants per km<sup>2</sup>) (European Commission, 2013b).



S'ha aconseguit formar grups de 6 a 10 persones màxim per grup, d'acord amb les recomanacions de la literatura sobre grups de discussió (Gutiérrez Brito, 2008; Steward i Shamdasani, 2015). En el cas dels joves hem tingut proporcionalment més participants a l'AMB, ja que s'han realitzat 2 grups. Els grups més petits de participants tant pel que fa als adults com als adolescents han tingut lloc a altres ZDP. Aquests 7 grups de discussió junt amb els 3 grups anteriors amb 20 participants adults realitzats en el marc del projecte ImPRovE sumen un total de 73 participants: 44 adults i 29 adolescents.

Taula 7. Distribució dels nombre de grups de discussió i els participants per territori, 2013-2016.

Territori	Adults Grups 2013/14			Adults Grups 2016			Adolescents Grups 2016			Total	
	Nº grups	Participants	% participants per territori	Nº grups	Participants	% participants per territori	Nº grups	Participants	% participants per territori	Participants	% participants per territori
Barcelona	2	13	65	1	10	42	1	8	28	31	42
AMB	1	7	35	1	8	33	2	15	52	30	41
Altres ZDP	0	0	0	1	6	25	1	6	21	12	16
<b>Total</b>	<b>3</b>	<b>20</b>	<b>100</b>	<b>3</b>	<b>24</b>	<b>100</b>	<b>4</b>	<b>29</b>	<b>100</b>	<b>73</b>	<b>100</b>

Font: Elaboració pròpia. Nota: AMB (municipi de l'àrea metropolitana); Altres ZDP (altres zones densament poblades de Catalunya).

En el cas dels adolescents, el primer grup va ser un grup amb un caràcter de prova per adaptar els següents. Amb la realització dels altres grups, es constata que a partir del tercer hi ha una saturació de la informació, amb la qual cosa no s'ha fet necessari planificar més grups.

A continuació detallem les característiques sociodemogràfiques dels participants en els grups de discussió realitzats el 2016 que s'han obtingut a partir de les fitxes que van omplir els participants.

Un 92% dels participants adults eren nascuts a Catalunya i majoritàriament vivien a Barcelona (un 42%). Un 67% dels participants van ser dones i l'interval d'edat dels participants va ser força ampli: dels 63 als 26 anys amb fills de 0 a 32 anys. La majoria de participants vivien en parella amb fills a càrrec (un 67%). Respecte de la situació laboral, un 83% dels participants treballaven. A més, el 75% dels participants tenien estudis universitaris i un estat de salut excel·lent, molt bo o bo.

Pel que fa als participants adolescents en els grups de discussió un 93% eren nascuts a Catalunya i un 52% vivien a l'AMB. Els participants van ser nois (55%) i noies (45%) d'entre 15 i 17 anys que cursaven en el moment de la realització dels grups majoritàriament 3r o 4t d'ESO (2n cicle de la ESO). Un 72% dels joves vivien en llars biparentals amb pare, mare i/o germans. Pel que fa a la situació laboral dels seus progenitors, un 76% del pares i un 83% de les mares treballaven. El nivell educatiu dels seus pares i mares és força alt, un 62% dels pares i les mares tenien estudis universitaris. També la majoria de participants manifestaven tenir un excel·lent, molt bo o bon estat de salut (un 87%).

A més d'aquestes característiques sociodemogràfiques també buscàvem la participació de persones de perfils socioeconòmics diversos. A partir de les variables professió en el cas dels adults (pregunta 7) i professió dels progenitors en el cas dels adolescents (preguntes 7 i 8) recollides en les fitxes sociodemogràfiques hem adaptat el model de Serracant-Melendres (2013) per classificar els participants segons el seu origen de classe.

Per determinar l'origen dels joves i, tenint en compte que la majoria dels adolescents de la mostra viuen en llars biparentals, optem per seleccionar el nivell professional més alt dels dos progenitors, a excepció dels joves que viuen en llars monoparentals, encapçalades per la mare, on hem determinat l'origen a partir de la professió d'aquesta. De fet, segons els últims resultats de la *ECJ 2012* en una societat

postindustrial com la nostra la posició de les mares és cada vegada més determinant en la definició de l'origen social dels joves (Serracant-Melendres, 2013).

La Taula 8 sintetitza la composició de la mostra segons l'origen social dels participants. En el cas dels grups d'adults realitzats el 2016 la distribució de participants va ser la següent: un 21% de classe mitjana-baixa o baixa, un 67% de classe mitjana o mitjana-alta i un 13% de classe alta. Pel que fa a la composició dels grups d'adolescents un 7% tenien un origen social mitjà-baix o baix, un 65% eren de classe mitjana o mitjana-alta i un 28% de joves eren de classe alta.

En relació al compliment dels criteris d'heterogeneïtat d'orígens socials dins de cada un dels grups observem a la Taula 9 que en un dels grups (FGA5) hi va haver dificultat per assolir-lo. Pel que fa als grups de joves els grups FGJ3 i FGJ4 van ser els més homogenis en relació a l'origen de classe (Taula 10). De totes maneres, valorem positivament que l'objectiu d'aconseguir participants de diferents orígens socials en el conjunt dels grups d'adults i d'adolescents s'ha aconseguit, malgrat que en alguns va ser més difícil d'obtenir una heterogeneïtat interna per motius d'accés a la mostra i de disponibilitat dels participants.

Taula 8. Classe social dels participants adults i dels adolescents, 2016.

Classe social	Adults		Adolescents	
	Freqüència	%	Freqüència	%
Alta	3	13	8	28
Mitjana - alta	14	58	14	48
Mitjana	2	8	5	17
Mitjana - baixa	1	4	1	3
Baixa	4	17	1	3
<b>Total</b>	<b>24</b>	<b>100</b>	<b>29</b>	<b>100</b>

Font: Elaboració pròpia a partir del qüestionari als participants.

Taula 9. Distribució dels adults en cada un dels grups de discussió segons l'origen de classe, 2016.

Classe social	FGA4		FGA5		FGA6	
	Freqüència	%	Freqüència	%	Freqüència	%
Alta	1	17	1	10	1	13
Mitjana - alta	4	67	8	80	2	25
Mitjana	0	0	1	10	1	13
Mitjana - baixa	0	0	0	0	1	13
Baixa	1	17	0	0	3	38
<b>Total</b>	<b>6</b>	<b>100</b>	<b>10</b>	<b>100</b>	<b>8</b>	<b>100</b>

Font: Elaboració pròpia a partir del qüestionari als participants.

Taula 10. Distribució dels adolescents en cada un dels grups de discussió segons l'origen de classe, 2016.

Classe social	FGJ1		FGJ2	
	Freqüència	%	Freqüència	%
Alta	0	0	4	50
Mitjana - alta	1	17	2	25
Mitjana	3	50	2	25
Mitjana - baixa	1	17	0	0
Baixa	1	17	0	0
<b>Total</b>	<b>6</b>	<b>100</b>	<b>8</b>	<b>100</b>

Font: Elaboració pròpia a partir del qüestionari als participants.

Taula 10. (continuació). Distribució dels adolescents en cada un dels grups de discussió segons l'origen de classe, 2016.

Classe social	FGJ3		FGJ4	
	Freqüència	%	Freqüència	%
Alta	1	13	3	43
Mitjana - alta	7	88	4	57
Mitjana	0	0	0	0
Mitjana - baixa	0	0	0	0
Baixa	0	0	0	0
<b>Total</b>	<b>8</b>	<b>100</b>	<b>7</b>	<b>100</b>

Font: Elaboració pròpia a partir del qüestionari als participants.

## **Instruments, fonts d'informació i desenvolupament dels grups de discussió**

Es va elaborar un guió amb preguntes obertes per ajudar a conduir els grups de discussió tant amb els adults com amb els adolescents. Els temes que es van discutir es recullen a la següent taula:

Taula 11. Guió dels temes desenvolupats en els grups de discussió, 2016.

<b>Pregunta 1.</b> Quines són les posicions socials que els infants i els adults haurien de poder desenvolupar en el nostre context?
<b>Pregunta 2.</b> Quines serien les necessitats intermèdies essencials que cal cobrir per tal que les persones puguin desenvolupar les posicions socials en el nostre context?
<b>Pregunta 3.</b> Quines activitats, béns i serveis es necessiten per poder desenvolupar les posicions socials en aquest context?
<b>Pregunta 4.</b> De quina manera la situació laboral, el lloc de residència, l'edat, el sexe i les condicions de salut influeixen les activitats, els béns i serveis necessaris en el nostre context?
<b>Pregunta 5.</b> Poden els infants i les famílies confiar en la provisió de béns i serveis públics en el nostre context?
<b>Pregunta 6.</b> Quines són les principals formes de consum en el nostre context?

Font: Basat en el guió proposat en la recerca *Pilot project for the development of a common methodology on Reference Budgets* (Goedemé *et al.*, 2015b). A totes les preguntes “en el nostre context” fa referència a àrees densament poblades de Catalunya.

Per abordar aquests temes i produir el consens social es va realitzar la següent dinàmica seguint la pauta desenvolupada en la recerca *Pilot project for the development of a common methodology on Reference Budgets* (Goedemé *et al.*, 2015b).

En primer lloc, es va demanar als participants de fer una pluja d'idees entorn de les posicions socials possibles dels adults i els infants (p.e. ser pare o mare, fills...) (pregunta 1). Per fer aquest exercici també es va presentar com a referència una família estandarditzada formada per 2 adults i 2 infants, un nen de 10 anys i una nena de 14 anys, en bon estat de salut que viuen en àrees densament poblades de Catalunya i amb les competències i informació suficients per desenvolupar-se en la vida quotidiana. Seguidament es va demanar que consensuessin aquest llistat, el qual es va contrastar amb el llistat pre-definit en aquesta recerca. Es va demanar que identifiquessin diferències i similituds entre ambdós llistats i es va acordar un llistat final de posicions socials.

En segon lloc, es va demanar també una pluja d'idees entorn de les activitats, béns i serveis necessaris per a poder exercir aquestes posicions (pregunta 3). Al llarg del desenvolupament d'aquest punt es buscava arribar a acords i també trobar arguments per incloure aquests elements, així com conèixer la influència de les següents variables sobre els béns i serveis proposats: situació laboral, el lloc de residència, l'edat, el sexe i les condicions de salut (pregunta 4). També es van comentar les formes de consum i la provisió de béns i serveis públics per a la realització d'aquestes activitats (pregunta 5 i 6).

Per últim, es va demanar als participants que agrupessin aquest llistat de béns i serveis en un llistat de necessitats, el qual va ser acordat per tots els participants. Després es va proposar als participants de contrastar aquest llistat amb les deu necessitats intermèdies establertes en aquesta recerca i es van recollir els arguments per incloure aquestes necessitats (Pregunta 2).

La mateixa dinàmica es va fer servir en els grups d'adults i adolescents. Tanmateix, amb els adolescents es va començar el debat per les posicions dels infants, enlloc de les posicions dels adults. Durant la discussió, no va interessar tractar les situacions personals dels participants ni les seves preferències, sinó aconseguir reflexions, arguments i consens de grup entorn dels diferents temes. Les discussions van discórrer sense cap incident.

Les sessions van tenir una durada al voltant d'1h30 en el cas dels adults i d'1h en el cas dels adolescents i es van dur a terme entre maig i juliol de 2016. Es va requerir d'una sala equipada amb taula i cadires al voltant, ordinador i projector per tal de presentar els materials a discutir en format PowerPoint, pissarra i un parell de gravadores. També es va oferir un refrigeri i begudes als participants a mode de cortesia. El moderador del debat va ser la mateixa persona investigadora i es va comptar en tots els grups amb un assistent/a per donar suport en la presentació dels materials i en la dinamització del debat.

## **Tractament de la informació i anàlisi dels grups de discussió**

Per tal d'analitzar de manera sistemàtica i rigorosa els grups de discussió s'ha dut a terme una transcripció completa de les converses realitzades. La traducció de la gravació en text en el cas dels grups de discussió ha estat molt complexa donades les interaccions entre participants. Tal com senyala Gutiérrez Brito (2008) tota traducció es una deformació, ja que amb la transcripció és difícil poder reproduir de manera exacta les converses que es produeixen en un context determinat.

Tanmateix, tres elements han ajudat a realitzar aquest procés per aconseguir aquesta fidelitat a la realitat. En primer lloc, la persona investigadora és la mateixa persona que ha conduït els grups, amb el suport d'un assistent. Això ha facilitat tant les transcripcions, així com el posterior exercici d'interpretació. En segon lloc, la moderadora/investigadora ha elaborat una fitxa per cada grup amb el següent contingut: característiques dels participants, dibuix de la sala i posicions dels participants, descripció del desenvolupament i valoració del grup, incidències i elements de millora. Aquest registre ha estat útil tant per al seguiment del treball de camp, com per contextualitzar la transcripció i l'anàlisi de les informacions. Per últim, una altra eina de suport a l'anàlisi han estat les fotografies preses de la pissarra utilitzada a cada grup on l'assistent ha anotat les posicions socials, activitats, béns i serveis, i necessitats comentades al llarg de la discussió. Aquesta última forma de registre només s'ha realitzat en els set grups de discussió duts a terme el 2016.

Un cop obtingudes aquestes transcripcions entenem el text resultant com el nostre escenari d'observació el qual s'ha interpretat a partir d'un procés de selecció, categorització i ordenació. El mètode emprat ha estat una anàlisi de contingut qualitativa en el sentit que ens hem fixat en la presència o no de determinats elements, els acords manifestos sobre aquestes qüestions i els motius, arguments i significats que les persones han expressat sobre els temes tractats (Lopez Aranguren, 2000). Tanmateix, en l'anàlisi de les posicions socials i necessitats intermèdies també hem complementat l'anàlisi des d'una proposta més quantitativa, és a dir, observant la freqüència d'aparició de determinats conceptes.

Per dur a terme aquest procés s'han seguit les següents fases: (1) reducció de la informació; (2) disposició i transformació de les dades; (3) obtenció de resultats i redacció de conclusions. Per reduir la informació hem determinat la unitat de mostreig, la unitat de registre i la unitat de context.



La unitat de mostreig són els deu textos resultants dels grups de discussió corresponents als set nous grups realitzats el 2016 i els tres grups previs duts a terme en el marc del projecte ImPRovE 2013-2014. Les unitats de registre es defineixen com “la mínima porción del contenido que el investigador aísla y separa por aparecer allí uno de los símbolos, palabras clave, slogans o temas que el investigador considera significativos” (Lopez Aranguren, 2000:561). En el cas dels grups de discussió és complex determinar de manera estàndard aquesta porció de contingut donades les interaccions entre participants. Per això, hem seleccionat en general com a mínima unitat de contingut frases o conjunts de frases que responen a la unitat de context, és a dir, a la pregunta plantejada.

Un cop establert com reduir la informació vam començar a codificar les unitats de contingut en funció d'un criteri temàtic. Per desenvolupar aquest procés de codificació, disposició i transformació de les dades s'ha utilitzat el programa *NVivo10 qualitative data software*. Aquest programa l'hem utilitzat en la mesura que és una eina per ordenar el gran volum d'informació recollida, però en cap cas substitueix la mirada de l'investigador que en tot moment ha de tenir present els passos que està duent a terme, en el marc d'un procés que té un caràcter cíclic i que requereix d'una reflexió constant per construir i reconstruir el sentit de la informació recollida (Massot, Dorio i Sabariego, 2004).

El programa ens ha permès fer un anàlisi sistemàtic de la informació mitjançant la creació d'un arbre de nodes –*tree nodes* – tal com s'anomena en la terminologia del programa, és a dir, una estructura jeràrquica de categories i sub-categories. A més, a banda, hem identificat, també a través de l'eina nodes, cada grup de discussió segons les característiques dels participants, és a dir, grup d'adults o grup d'adolescents i el seu territori: Barcelona, Àrea Metropolitana de Barcelona o altres zones densament poblades. Aquesta classificació ens ha estat necessària per poder treballar la informació per separat dels grups segons aquestes característiques, així com també extreure creuaments entre categories per comparar significats entre els grups d'entrevistats mitjançant l'eina *matrius de codificació*.

L'arbre de nodes s'ha estructurat a partir dels temes a tractar en els grups de discussió: posicions socials, necessitats intermèdies i variables condicionants de les activitats i/o béns i serveis. Les activitats, els béns i serveis i les pautes de consum les hem integrat dins de cada una de les necessitats intermèdies específiques. Aquests tres temes constitueixen el que hem anomenat dimensions d'anàlisi. A partir d'aquí hem

desplegat l'arbre de nodes amb sub-dimensions, categories i sub-categories corresponents a cada dimensió amb un total de 209 nodes. Per tant, majoritàriament el procés d'anàlisi s'ha desenvolupat des d'una lògica deductiva a partir dels temes definits prèviament, però també inductiva, ja que hem incorporat elements emergents tal com es detalla a continuació.

Tal com es mostra a la Taula 12. La dimensió de les posicions socials s'ha estructurat en dues sub-dimensions amb un total de 75 nodes: posicions socials dels adults i posicions socials dels infants. De cada una d'elles se n'han derivat categories i sub-categories. Concretament, de les posicions socials dels adults sorgeixen 6 categories i 33 subcategories, mentre que per les posicions socials dels infants hem creat 5 categories i 28 sub-categories. Aquestes sub-categories han estat creades inductivament a partir de la seva emergència directa dels grups de discussió, d'acord amb el desenvolupament de la dinàmica dels grups. Per tant, segons la nomenclatura del programa les anomenem *free nodes*, nodes lliures. La informació d'aquesta dimensió només s'ha pogut obtenir a partir dels set nous grups d'adults i joves realitzats el 2016.

La segona dimensió d'anàlisi és la més extensa tal com s'observa a la Taula 13. Conté un total de 127 nodes estructurats en 14 sub-dimensions corresponents a les necessitats intermèdies, de les quals se'n deriven categories i sub-categories tal com es mostra a continuació. Exceptuant les 4 últimes que han emergit a partir dels grups de discussió, és a dir, són *free nodes*, la resta han estat creades prèviament a partir del guió dels grups de discussió, les quals es remeten a l'estructura d'activitats, béns i serveis reflectida a cada cistella.

1. Alimentació saludable: 9 categories i 7 sub-categories
2. Roba adequada: 4 categories i 9 sub-categories
3. Descans: 1 categoria
4. Lleure: 4 categories i 8 sub-categories
5. Higiene personal: 3 categories i 5 sub-categories
6. Atenció sanitària: 3 categories i 2 sub-categories
7. Manteniment de les relacions socials significatives: 9 categories i 6 sub-categories
8. Benestar en la infantesa: 7 categories i 20 sub-categories
9. Mobilitat: 5 categories i 4 sub-categories
10. Habitatge: 3 categories i 3 sub-categories
11. Seguretat

12. Aprenentatge permanent

13. Temps

14. Treball

Per últim, la tercera dimensió es correspon a les variables condicionants de les activitats i/o béns i serveis, amb cinc categories d'anàlisi: situació laboral, població de residència, edat, sexe i estat de salut (Taula 14).

Mitjançant aquesta ordenació i disposició de les dades hem pogut aproximar-nos al consens social entorn de les posicions socials i les necessitats intermèdies en àrees densament poblades de Catalunya. També ens ha permès aprofundir en els arguments per a la inclusió dels béns i serveis de les diferents cistelles, complementant la informació prèvia obtinguda en els tres grups de discussió realitzats en el projecte ImPRovE, així com també observar el paper dels diferents condicionants en la composició de les cistelles. Tota aquesta anàlisi ens serveix per justificar millor el contingut de les cistelles de béns i serveis en el nostre context per les diferents tipologies de família, elements que integrarem a l'apartat de resultats.

Taula 12. Arbre de categories i sub-categories de la dimensió 'posicions socials' elaborat per a l'anàlisi de contingut dels grups de discussió.

Dimensió	Sub-dimensió	Categoria	Sub-categoria
Posicions socials	Adults Posicions socials	Àmbit ciutadà	Afiliat-Militant d'un partit
			Ciudadans
			Membre associació
		Àmbit educatiu	Voluntaris
			Estudiants
			Cuidadors
		Àmbit familiar	Educadors
			Fills
			Germans
			Parella
			Pares-Mares
			Tiets
			Exparella
			Jove
			Nebots
			Padrins
		Àmbit laboral	Companyes de feina
			Membre sindicat
			Ocupador
			Treballador-a
		Àmbit social	Aturats
			Amics
			Consumidors
			Esportistes
			Veïns
		Altres posicions socials	Coneguts
			Conductors
Espectadors			
Membre comunitat religiosa			
Mestressa de casa			
Pacients			
Pensionistes			
Referents			
Infants Posicions socials		Àmbit ciutadà	Ciudadans
			Membre associació
			Voluntaris
		Àmbit educatiu	Alumnes
			Company d'escola
			Delegat de classe
		Àmbit familiar	Cosins
			Fills
			Germans
			Nebots
			Néts
			Filloles
			Cuidadors
		Àmbit social	Amics
			Consumidors
			Esportistes
			Veïns
			Coneguts
		Altres posicions socials	Parella
			Nens
			Membre comunitat religiosa
			Pacients
			Referents
			Artistes
			Col·laboradors domèstics
			Espectadors
			Usuaris digitals
Usuaris serveis públics			

Font: Elaboració pròpia.

Taula 13. Arbre de categories i sub-categories de la dimensió 'necessitats intermèdies' elaborat per a l'anàlisi de contingut dels grups de discussió.

Dimensió	Sub-dimensió	Categoria	Sub-categoria		
Necessitats intermèdies	Alimentació saludable	Justificació alimentació			
		Acceptabilitat del menú	Menú adults Menú infants		
		Activitat física	Tipus d'activitat física		
		Altres funcions de l'alimentació			
		Condiments			
		Cuinar a casa			
		Equipament i utensilis de cuina			
		Líquids	Aigua Altres líquids		
		Pautes consum alimentació	Compra Mercats Compra Supermercats		
		Roba adequada	Justificació roba i calçat		
			Acceptabilitat ítems roba	Ítems roba adolescents Ítems roba adults Ítems roba nens	
			Manteniment roba i calçat		
			Pautes de consum roba, calçat, accessoris	Botigues Intercanvi Preu roba i calçat Producció pròpia Quantitat vs. Qualitat Segona mà	
			Descans	Justificació descans i accessoris	
				Lleure	Justificació lleure
	Participació social i cultural dels adults		Activitats socioculturals adults Membre associació/club adults Serveis de cura		
	Temps de lleure dins la llar		Accessoris electrònics llar Lectura		
	Vacances fora de casa		Tipologia de vacances Durada de les vacances Allotjament		
	Higiene personal		Justificació higiene		
		Acceptabilitat productes d'higiene	Higiene cos i mans Higiene bucal Cura dels cabells Maquillatge Altres accessoris per al bany		
		Pautes consum higiene personal			
		Assistència sanitària	Justificació assistència sanitària		
			Acceptabilitat productes salut	Serveis de Salut Serveis Específics de Salut Serveis Generals de Salut	
	Manteniment de les relacions socials significatives	Justificació relacions socials			
		Visites familiars i amics-adults	Freqüència visites Justificació visites Recursos per convidar		
		Menjar fora de casa			
		Ordinador i els seus accessoris			
		Accés a Internet			
		Impressora i accessoris			
		Mòbils-Xarxes socials adults			
		Celebracions familiars	Justificació celebracions Recursos festivitats Tipus de festivitats		
		Documents ciutadania			

Font: Elaboració pròpia.

Taula 13. (continuació). Arbre de categories i sub-categories de la dimensió 'necessitats intermèdies' elaborat per a l'anàlisi de contingut dels grups de discussió.

<b>Dimensió</b>	<b>Sub-dimensió</b>	<b>Categoria</b>	<b>Sub-categoria</b>	
<b>Necessitats intermèdies</b>	<b>Benestar en la infantesa</b>	<b>Justificació benestar infantesa</b>		
		Participació social i cultural infants	Activitats d'estiu infants	
			Activitats socioculturals infants	
			Extraescolars i associacionisme	
			Sortides amb amics	
			Sortides conjuntes familiars	
		Educació	Matrícula escolar	
			Llibres escola	
			Material escolar	
			Cantina escolar	
			Excursions escolars	
			Roba escola	
			Altres serveis	
		Celebracions infants	Recursos celebracions infants	
		Jocs i regals		
		Mòbils adolescents	Despesa associada al mòbil	
			Justificació mòbil	
			Ús del mòbil	
			Xarxes socials	
		Diners de butxaca infants	Justificació diners de butxaca	
			Quantitat diners de butxaca	
			Usos diners de butxaca	
		<b>Mobilitat</b>	<b>Justificació mobilitat</b>	
			Transport públic	Suficiència del transport públic
				Tipus títols de transport
			Transport privat	Ús del cotxe
			Bicicleta	Ús bicicleta
	Mobilitat vacances			
<b>Habitatge</b>	<b>Justificació habitatge</b>			
	Condicions habitatge			
	Serveis Habitatge	Subministraments habitatge		
		Comunitat de Veïns		
		Altres serveis		
	<b>Seguretat</b>			
	<b>Aprenentatge permanent</b>			
	<b>Temps</b>			
	<b>Treball</b>			

Font: Elaboració pròpia.

Taula 14. Arbre de categories i sub-categories de la dimensió ‘variables condicionants de les activitats i/o béns i serveis’ elaborat per a l'anàlisi de contingut dels grups de discussió.

<b>Dimensió</b>	<b>Categoria</b>
<b>Condicionants</b>	Situació laboral de la persona
	Població de residència
	Edat de la persona
	Sexe de la persona
	Salut

Font: Elaboració pròpia.

### **2.3. Estudi 1. Fase 3. Ampliar els RBs per a 10 tipologies de família**

En aquesta fase ampliarem les cistelles de béns i serveis per a 10 tipologies de família, per tal de calcular les escales d'equivalència necessàries per a l'Estudi 2 per utilitzar els RBs com a indicador per a la mesura de la pobresa.

#### **Procediment**

Configurem els RBs per les següents tipologies de família: (1) dona soltera en edat activa; (2) home solter en edat activa; (3) dona en edat activa amb un fill de 10 anys; (4) home en edat activa amb un fill de 10 anys; (5) dona en edat activa amb una filla de 14 anys; (6) home en edat activa amb una filla de 14 anys; (7) parella composta d'home i dona en edat activa sense fills; (8) parella composta d'home i dona en edat activa amb un fill de 10 anys; (9) parella composta d'home i dona en edat activa amb una filla de 14 anys; (10) parella composta d'home i dona en edat activa amb dos fills (nen de 10 anys i noia de 14 anys).

Les tipologies 4,5,6, 8 i 9 no havien estat desenvolupades en el projecte ImPRovE. D'aquesta manera podem calcular el pressupost addicional que els adults i els infants de 10 i 14 anys representen a la llar. Per realitzar aquesta estimació hem adoptat el mètode de Oldfield i Bradshaw (2011), el qual es basa en restar del pressupost estimat per a una persona soltera amb un infant de 14 anys o de 10 anys el pressupost d'una persona sola. D'aquesta manera s'obté el pressupost de l'infant. Per trobar l'escala d'equivalència dividim aquesta quantitat pel pressupost d'una persona sola (Browning, Chiappori i Lewbel, 2006). A l'apartat de resultats de l'Estudi 1 es mostrarà per a cada cistella les 10 tipologies de família.

## 2.4. Criteris de qualitat i àrees de millora de l'estudi 1

Els RBs han estat construïts en aquest projecte per infants i adults en edat de treballar (ocupats o aturats) que viuen en grans àrees urbanes, amb bon estat de salut, ben informats i amb competències suficients per prendre decisions i actuar de manera racional i autònoma. Aquests supòsits de partida posen a la recerca certes limitacions. Però alhora, són fonamentals per acotar el camp d'estudi, ja que sense aquests paràmetres es faria molt difícil poder estimar un nivell de vida acceptable. Així, doncs, cal ser conscients que amb aquests criteris estem fent una estimació a la baixa d'aquests costos, ja que desenvolupar-ho per a altres tipologies de família i situacions personals, particularment de salut, requeririen cobrir altres necessitats. En aquest apartat posem de relleu criteris de qualitat del procés seguit, així com àrees de millora per a la transferència d'aquesta perspectiva en el nostre context.

En primer lloc, en el nostre cas, on no disposàvem d'experiència prèvia en aquest camp, començar la base de les cistelles amb la proposta belga en el marc del projecte ImPRovE ens ha estat útil i ha facilitat l'estructuració del procés de construcció. Això no obstant, s'ha recorregut a diferents fonts d'informació per ajustar-nos al màxim a la nostra realitat local. En aquest sentit, la triangulació de les diferents fonts i l'ús de grups de discussió per observar l'acceptabilitat de les cistelles, es correspon al compliment del criteri de *credibilitat*, tal com s'anomena en recerca qualitativa (Guba, 1981; Dorio, Sabariego i Massot, 2004).

A més, amb els set grups de discussió addicionals realitzats en la segona fase de l'Estudi 1 amb adults i adolescents s'han contrastat els RBs per àrees densament poblades de Catalunya. En general, s'ha aconseguit una mostra d'acord amb els criteris de selecció establerts tant pels grups amb participants adults com en el cas dels grups amb adolescents. L'únic requisit que ha estat difícil mantenir ha estat el criteri d'heterogeneïtat d'orígens de classe degut a les vies d'accés. Observem que l'estratègia d'organitzar els grups a través de fundacions privades i entitats socials de lleure ens ha facilitat més garantir la diversitat dins dels grups, segurament perquè aquestes entitats absorbeixen persones provinents de diferents contextos. Mentre que l'accés a través d'escoles o serveis socials ho ha dificultat. Aquest aspecte sobre l'accés a la mostra és important a considerar en futures recerques que vulguin obtenir aquesta diversitat.



En segon lloc, en aquest tipus de recerca l'investigador té un paper relativament actiu en la interpretació i selecció de la informació, el desenvolupament dels grups de discussió, l'assignació de preus i la construcció dels resultats. Per minimitzar aquesta interrelació entre objecte i subjecte d'estudi i evitar decisions arbitràries s'han seguit els criteris comuns proposats en el projecte ImPRovE per desenvolupar les diferents cistelles de béns i serveis. A més, ha estat cabdal justificar les decisions preses sobre la composició de les cistelles en base a les diferents fonts d'informació i contrastar aquestes decisions amb el propi equip d'investigadors, així com amb els altres equips de recerca europeus. Aquesta explicació dels procediments emprats i del posicionament adoptat ens condueixen a fer possible la consistència dels resultats obtinguts i la transparència, criteris de *depèndencia* i *confirmabilitat*, que també cal garantir en recerca qualitativa (Dorio *et al.*, 2004). Per últim, aquesta explicitació dels passos seguits té la voluntat també d'assolir la *transferibilitat* en altres contextos.

### **3. ESTUDI 2: Els RBs com a indicador per contextualitzar la pobresa relativa**

#### **3.1. Estudi 2. Fases 1 i 2**

Per tal d'explorar els RBs com a indicador per contextualitzar la pobresa relativa en àrees densament poblades de Catalunya s'ha treballat amb l'enquesta transversal EU-SILC.

#### **Procediment**

**Fase 1:** Adaptar els RBs com a llindar de pobresa. Aquest procediment s'ha realitzat a partir de la metodologia desenvolupada en el projecte europeu ImPRovE per l'equip coordinador del CSB-UA<sup>32</sup> (Penne, Cussó, Mäkinen, Storms i Goedemé, 2016).

**Fase 2:** Estimar la pobresa mitjançant els RBs i l'indicador de pobresa relativa en àrees densament poblades de Catalunya per diferents grups poblacionals a través de l'EU-SILC per l'any 2012.

#### **Mostra, instruments i fonts d'informació**

Catalunya està considerada dins d'aquesta enquesta com a regió mitjançant la categoria NUTS-2. Eurostat publica a la seva pàgina web dades d'aquest territori. Tanmateix, per treballar indicadors més específics de pobresa i, en particular, l'efecte en diferents grups poblacionals és necessari accedir a les microdades<sup>33</sup>. Seleccionem aquest any perquè conté un mòdul especial de dades sobre l'habitatge, una de les cistelles de béns i serveis rellevants a incloure en l'indicador dels RBs. A més, d'aquesta manera podem comparar els resultats obtinguts amb la recerca prèvia sobre aquest tema realitzada en el marc del projecte europeu ImPRovE on s'han desenvolupat línies de pobresa a partir dels RBs construïts per primera vegada de manera comparable per Bèlgica, Espanya i Finlàndia (Penne *et al.*, 2016). Per l'any 2012 disposem d'una mostra representativa de 532 llars per àrees densament poblades de Catalunya.

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<sup>32</sup> L'equip de treball per desenvolupar aquesta metodologia va estar format per Dr. Tim Goedemé, Dra. Bérénice Storms i Sra. Tess Penne, en el qual vaig col·laborar en el marc de l'estada de recerca al CSB-UA (Anvers, Bèlgica), període gener-abril 2015. També vam comptar amb la participació del Sr. Lauri Mäkinen de la Universitat de Turku (Finlàndia).

<sup>33</sup> Per accedir a les microdades que publica Eurostat en diversos camps, primer la Universitat Ramon Llull va ser reconeguda per Eurostat com a entitat de recerca al setembre de 2015. Després, al novembre de 2015 es va procedir a presentar un projecte específic a càrrec del director de tesi i la doctoranda per sol·licitar l'accés a les microdades de EU-SILC i poder realitzar la present tesi. L'aprovació definitiva i l'accés a les dades ha estat efectiva al gener de 2016.

## Tractament de les dades

L'anàlisi estadístic de les dades de l'EU-SILC s'ha realitzat mitjançant el programa STATA – *Data Analysis and Statistical Software* (versió 12.0) i els resultats es presenten a la Part IV resultats Estudi 2. A continuació s'exposa el procés de preparació i tractament de les dades de l'enquesta per realitzar les estimacions del llindar de pobresa relativa i el del nou indicador construït per àrees desament poblades de Catalunya.

### *Preparació de les dades*

L'estructura complexa de l'EU-SILC *User Database* (UDB) requereix realitzar un seguit d'ajustaments abans de començar a treballar les dades. La informació de l'enquesta està separada en els quatre fitxers següents: *Household Register (D file)*, inclou informació de totes les llars, independentment de si s'han pogut contactar o entrevistar; *Personal Register (R file)*, conté un registre de totes les persones que viuen a la llar o estan temporalment absents; *Household Data (H file)*, recull les dades relatives a les condicions de l'habitatge i els ingressos i *Personal Data (P file)*, engloba la informació de cada persona candidata entrevistada (European Commission, 2013b). En primer lloc, ha estat necessari transformar aquestes dades en el format '.dta' per poder-les introduir al programa STATA.

En segon lloc, d'acord amb Goedemé (2013) qualsevol indicador construït a partir de l'enquesta EU-SILC ha d'anar acompanyat del seu marge d'error, per tal de tenir en compte la precisió i fiabilitat de les estimacions inferides a partir de la mostra. Aquest valor ens indica la diferència màxima entre l'estimació puntual obtinguda a la mostra i el valor vertader del paràmetre poblacional (Bardina, Farré, López-Roldán 2005). Donat que hi ha lleugeres diferències en el disseny de la mostra pels diferents països inclosos a l'EU-SILC i també variacions segons l'onada de l'enquesta és necessari reconstruir les variables del disseny de la mostra per tal de poder estimar correctament l'error. Per aquest motiu hem aplicat la proposta metodològica de Zardo-Trindade i Goedemé (2016) a l'arxiu 'D' de la versió 4 de l'EU-SILC UDB 2012 (1 de gener de 2016) per ajustar les variables del disseny de la mostra. Finalment, un cop aplicat aquest procediment per als 31 països, els quatre arxius han estat fusionats en un de sol, el qual és el fitxer de referència per a realitzar les estimacions.

### *Tractament de les dades*

D'una banda, per tal d'estimar el llindar i la taxa de pobresa relativa per tots els països membres de la UE i Catalunya s'ha utilitzat la sintaxis preparada pel programa STATA elaborada per Goedemé i Montaigne (2013). D'aquesta manera hem pogut situar Catalunya en relació a Espanya i la resta de països europeus pel que fa a aquest indicador.

D'una altra banda, per utilitzar els RBs construïts per àrees densament poblades de Catalunya com a llindar de pobresa a través de l'enquesta EU-SILC ha calgut realitzar les següents adaptacions seguint la metodologia desenvolupada en el projecte ImPRovE i detallada a Penne *et al.* (2016): (1) convertir els RBs al nivell de preus de l'any 2011, ja que l'EU-SILC 2012 recull dades dels ingressos per a aquest any; (2) construir escales d'equivalència basades en els RBs; (3) assignar el valor dels RBs a tota la població de la mostra mitjançant les escales d'equivalència i (4) afegir a l'indicador els costos reals de l'habitatge (variable 'hh070').

Finalment, s'han comparat els resultats obtinguts d'ambdós indicadors per àrees densament poblades de Catalunya per diferents grups poblacionals segons les següents variables: tinença de l'habitatge, llars amb/sense infants i edat, també seguint els mateixos criteris treballats a Penne *et al.* (2016). Amb aquests procediments garantim que les dades seran comparables amb els resultats aconseguits en l'anterior projecte.

### **3.2. Criteris de qualitat i àrees de millora de l'estudi 2**

Pel que fa al segon estudi, s'ha seguit el protocol i requisits acordats amb Eurostat en relació a l'ús de les microdades de l'EU-SILC. També s'ha comptat amb el suport metodològic de l'equip del CSB-UA esmentat anteriorment. Tanmateix, una de les limitacions d'aquest segon estudi ha estat la disponibilitat de mostra per Catalunya a través de l'EU-SILC. Per millorar la precisió de les estimacions d'ambdós indicadors, caldria reduir els intervals de confiança obtinguts i, per tant, reduir el marge d'error mitjançant l'augment de la mida de la mostra (Bardina *et al.*, 2005).

## **PART IV: RESULTATS / RESULTS**

### **RESULTS STUDY 1: Development of reference budgets in Catalonia**

#### **1. Introduction**

This section is divided in 11 chapters. First, it is explored the common consensus on social positions and intermediate needs in Catalonia densely populated areas. Secondly, the baskets of goods and services are described in the following order: Healthy Food, Suitable clothing, Rest and Leisure, Personal Care, Health Care, Maintaining Significant Social Relations, Safety in Childhood, Mobility and Housing. Finally, all this baskets are added to find the total minimum budget needed to participate adequately in our society.

#### **2. Common ground on Social Positions and Intermediate needs**

##### **2.1. Social Positions**

As previously described, reference budgets represent the minimum necessary resources to participate adequately in society, which means that people should be able to develop various social positions in order to be a member of society. In this section, the social consensus around the common social positions is presented. It was achieved throughout seven focus group discussions with adults and teenagers in 2016. The purpose was to obtain consensus on a list of social positions that adults and children should develop in densely populated areas in Catalonia in agreement with the essential positions defined by law in the *Spanish Constitution* (1978), the *Charter of Fundamental Rights of the European Union* (hereafter '*the Charter*') (2000) and the *Catalan Statue of Catalonia* (2006) previously described in the theoretical framework (Part II, Table 1). The assessment of social positions in our context has the purpose to verify the theoretical framework and check that the reference budgets developed contain the necessary goods and services to fulfill an adequate social participation.

The procedure to identify the list of social positions during the focus groups discussions was the following. First, the concept of social position was presented to the participants of each group and some examples were given (e.g. 'being a mother/father' for adults; 'being siblings' for children). Secondly, the participants in a process of brainstorming were asked to add other social positions for adults in working age and children (boy of 10 years old and girl 14 years old), which are the profiles that compose the reference family. They argued about these other positions and agreed on the list. In

all focus groups, a board was used to make the building list visible to all of them. Finally, their list was contrasted with the pre-defined list of social positions defined in the research for the reference family presented in Part II, Table 2. They were asked to point out the similarities and differences between both lists in order to end-up with a final list of essential social positions agreed by all participants.

The transcribed information of the discussions through NVivo10 qualitative data software and the list on the board on the social positions constructed in each focus group, which was registered with a picture, allowed us to elaborate the common list of social positions. We began the analysis of this part of the discourse from inductive categories, called 'free nodes' in the NVivo software, because the starting point were the positions expressed by the participants. Then, the 'free nodes' related to social positions identified in all focus groups have been grouped in main spheres of participation: family, work (only for adults), education and active citizenship, which correspond to the main fundamental rights framework. In the analysis a new domain emerged, the social sphere which contains some other relevant positions mentioned by the participants. In total 33 and 28 social positions were identified for adults and children respectively. Finally, as our interest was to find the common social positions believed to be essential to participate adequately in our society, this core list was reduced to 20 and 14 for adults and children respectively. At the same time, we selected only the positions that were recognised by both adult and teenager participants and at least mentioned in three focus groups or at least appeared in two focus groups and minimum in two different territories (Barcelona, AMB<sup>34</sup> or other densely populated areas). However, this does not mean that other positions identified by adults or children are not possible to develop. Thus, this other positions will be also commented in the analysis.

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<sup>34</sup> Barcelona Metropolitan Area.

## Adults' social positions

The 20 social positions for adults are illustrated in Tables 15 and 16. In the first place being a member of a family and the different social positions that people have within it are seen as important. This sphere is the one with most references within the focus groups discussions. The results about social positions show that main ones are developed in a nuclear family, which is the reference type of household to estimate the budgets in this project. In relation to the positions of 'being a mother or father', the participants agreed that in case of modification of the composition of the model family, the social position will not change, but the social role performed, the actions and expectations derived from the position, will be different. For example, the case of a single person with children:

“La diferència en una família monoparental està en que estàs sol i que estàs sol per tota la teva vida per les coses bones i les dolentes. I que ets mare les 24 hores del dia.” (FGA4, P5, woman, middle-high SES, other areas)<sup>35</sup>

Other specific social positions highlighted by adults within the family were: 'former partner', 'daughter/son in law' or 'nephews'. Children also pointed out that adults could be 'godparents'. In fact, the list could be wider, especially for big families, when taking into account the extended family or in the case of recomposed families. In this sphere two additional positions were added, both by adults and teenagers in different territories (see Table 16). Adults were also identified with the position of 'caregivers' and 'educators' within the family as justified by participants in the following quotes:

“Jo crec que tots els adults són referents d' algú, cuidadors d' algú, encara que no tinguin fills, segur que cuiden algú d'alguna manera.” (FGJ2, P7, girl, high SES, AMB)

“Clar, allà s'ha posat el rol de pare i mare que equival a ser educador.” (FGA5, P1, woman, middle-high SES, Bcn)

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<sup>35</sup> FGA, plus number: code focus group adults; FGJ, plus number: code focus group teenagers; P, plus number: participant code in each focus group; M: moderator. Socioeconomic status (SES): high, middle-high, middle, middle-low, low. Bcn: Barcelona; AMB: Metropolitan Area of Barcelona; Other areas: Other densely populated areas (ZDP).

The positions in the social sphere represent the second most important in terms of citations. Being ‘neighbour’, ‘friend’, ‘consumer’ or ‘sport-man/woman’ are seen as other social positions that adults should be able to develop in our society. The position as a consumer for adults could be understood in a broad way. It could respond to the use of the personal time to do a wide variety of things as one pleases or linked to other social positions as expressed in the discussions:

“De fer allò que t’agrada durant la setmana que jo veig que això va en funció de la qualitat de vida una mica de cada persona. Però hi ha gent que pot trobar aquest espai per ell mateix. L’espai personal, de dir, faig una cosa que m’agrada i és per mi.” (FGA5, P5, woman, middle-high SES, Bcn)

“Comprar menjar. Perquè són consumidors per dues bandes, perquè també han de comprar lo dels teus fills, o sigui, és com si consumissin per dos els pares.” (FGJ4, P6, girl, middle-high SES, AMB)

In the teenager focus groups ‘acquaintance’ was also mentioned as a social position arguing that this type of relation could be also possible in our society, meaning a less significant relation than a ‘friend’ or ‘neighbour’.

Another important group within the social positions is the ones that people take in the labour sphere: ‘being a worker’, ‘member of a trade union’, ‘employer’ and ‘co-worker’. The participation in this sphere is seen not only as a source of economic resources, but also it is important in terms of identity and for developing social relations as signalled in these words:

“Quan treballes formes part d’un lloc, necessites dels teus companys, del teu grup.” (FGA6, P6, woman, middle SES, AMB)

In some focus groups the fact of ‘being unemployed’ was also mentioned as a social position. However, the participants interpreted that this is finally a working status that will pose difficulties in the fulfillment of other social positions, such as consumer or member of an association/club. For this reason, it is not incorporated in the list. The Figure 2 illustrates the selection of 30 meaningful words, with at least 3 characters, most frequent that appeared in the conversation about adult social positions in all groups. It is clear the weight that the word ‘workers’ – in Catalan ‘treballadors’ – has in the overall discourse.



In the sphere of citizenship the following social positions were seen as the most important: ‘being member of an association/club’ and ‘being citizen’ with its rights and duties. Non-governmental organisations, parents’ associations and sports clubs were the type of associations said by the participants. In three focus groups and represented in different territories it was added ‘being members of a political party’ and ‘volunteers’.

Finally, in nearly all focus groups it was recognised the position of adults as ‘students’, although adult’s participants claimed that sometimes this could be difficult to develop because of lack of time due to family obligations and the organisation of work time or financial reasons. Despite this fact, the position is clearly present as noticed in the quote:

“Sí, poden fer formació continuada i ser perfectament estudiants ni que sigui d’un curs d’informàtica! O sigui, tot el que hem posat a nens, ho podrien ser els adults”. (FGJ4, P6, girl, middle-high SES, AMB)

Other social positions mentioned only by adults were ‘being a housewife (independently of being woman or man)’, ‘member of a religious community’, ‘spectators’ and ‘pensioners’. However, this latter position could not be applied to the reference family, because of adult’s age. Additional social positions for adults mentioned only by teenagers were: ‘being a reference person’, ‘patients’ or ‘drivers’.

In conclusion, we notice that the core list of common social positions obtained for adults is very wide and includes different spheres to have an adequate social participation. The main idea as expressed in this group of teenagers, is that all of these positions contribute to be a member of society as shown in the following quotes:

“P2: No sé, però jo crec que treballador també hauria d’estar a dintre de membre de la societat...és part de la societat. (FGJ4, P2, boy, middle-high SES, AMB). M: Com a membre de la societat en els adults hi ha alguna altre tipus de posició que puguin fer a part de les que heu dit? P1: Bueno, es que suposo que el fet de tenir fills també contribueix a la societat, no? (FGJ4, P1, girl, high SES, AMB). P4: I membre d’un sindicat, també està dins de membre de la societat perquè defensa els teus drets. (FGJ4, P4, boy, high SES, AMB). P3: I votants, electors? Que poden o tenen dret a vot per escollir qui mana.” (FGJ4, P3, boy, middle-high SES, AMB)

Table 15. Common Social Positions for Adults agreed by adults and teenagers in the focus groups, 2016.

Category Social Positions Adults	Adults		Teenagers		Total	
	Nº focus groups	References	Nº focus groups	References	Nº focus groups	References
<b>Family sphere</b>						<b>45</b>
Father/Mother	3	5	4	6	7	11
Son/daughter	3	3	4	5	7	8
Siblings	3	3	4	4	7	7
Partners	1	2	2	5	3	7
Uncles/Aunts	2	2	1	1	3	3
Caregivers	1	2	1	3	2	5
Educators	1	1	1	3	2	4
<b>Labour sphere</b>						<b>33</b>
Worker	3	4	4	12	7	16
Member of a trade union	1	1	4	6	5	7
Employer	2	2	3	3	5	5
Co-workers	1	2	3	3	4	5
<b>Social sphere</b>						<b>36</b>
Neighbours	3	5	4	5	7	10
Friends	3	3	3	8	6	11
Consumers	1	2	2	9	3	11
Sports-man / Sports-woman	1	2	2	2	3	4
<b>Education sphere</b>						<b>14</b>
Students	2	3	4	11	6	14
<b>Active Citizenship sphere</b>						<b>30</b>
Members of an association/club	3	7	4	6	7	13
Citizens	3	4	3	5	6	9
Members of a political party	2	2	1	2	3	4
Volunteers	2	3	1	1	3	4
<b>Total</b>	<b>3</b>	<b>58</b>	<b>4</b>	<b>100</b>	<b>7</b>	<b>158</b>

Source: Analysis of the focus groups through NVivo10 qualitative data software.

Figure 2. 'Word cloud' on Adults' Social Positions in the focus groups, 2016.



Source: Analysis of the focus groups through NVivo10 qualitative data software.

Table 16. Common Social Positions for Adults agreed by adults and teenagers according to the territory in the focus groups, 2016.

Category Social Positions Adults	Barcelona		AMB		Other areas		Total	
	Nº focus groups	References	Nº focus groups	References	Nº focus groups	References	Nº focus groups	References
Family sphere								<b>45</b>
Father/Mother	2	5	3	3	2	3	7	11
Son/daughter	2	3	3	3	2	2	7	8
Siblings	2	2	3	3	2	2	7	7
Partners	2	4	1	3	0	0	3	7
Uncles/Aunts	1	1	2	2	0	0	3	3
Caregivers	0	0	1	3	1	2	2	5
Educators	1	1	1	3	0	0	2	4
Labour sphere								<b>33</b>
Worker	2	4	3	9	2	3	7	16
Member of a trade union	1	1	3	5	1	1	5	7
Employer	2	2	2	2	1	1	5	5
Co-workers	1	1	2	2	1	2	4	5
Social sphere								<b>36</b>
Neighbours	2	3	3	5	2	2	7	10
Friends	2	3	2	5	2	3	6	11
Consumers	2	4	1	7	0	0	3	11
Sports-man / Sports-woman	1	2	1	1	1	1	3	4
Education sphere								<b>14</b>
Students	2	4	3	7	1	3	6	14
Active Citizenship sphere								<b>30</b>
Members of an association/club	2	4	3	6	2	3	7	13
Citizens	2	3	3	5	1	1	6	9
Members of a political party	2	3	1	1	0	0	3	4
Volunteers	2	3	1	1	0	0	3	4
<b>Total</b>	<b>2</b>	<b>53</b>	<b>3</b>	<b>76</b>	<b>2</b>	<b>29</b>	<b>7</b>	<b>158</b>

Source: Analysis of the focus groups through NVivo10 qualitative data software. Note: AMB (Barcelona Metropolitan Area) and Other areas (other densely populated areas).

## Children's social positions

In the case of children 14 social positions are identified distributed in four spheres of participation as illustrated in Tables 17 and 18. In this case, the social sphere is the one with more references and includes the same ones identified for adults: 'being friends', 'neighbours', 'sports-boy/girl' and 'consumers'. In the case of 'being consumers', it was argued by some adult participants, that it has greater importance when children grow and become teenagers. This is a key element to take into account when developing budgets. It will be necessary to identify differences by age when translating the needs into the minimum goods and services. Thus, the arguments of the teenagers interviewed will be of great value (for example in verifying the shops for the different items and, especially, checking the services and activities needed for the Safety in Childhood basket).

The relevance of this social sphere could be also observed in Figure 3. The 'word cloud' represents the 30 meaningful words, with at least 3 characters, most frequent in the discourse of all focus groups regarding children social positions. Other positions that in the case of children could form part of this social sphere and that were only manifested by the teenagers groups referred to 'being an acquaintance' (mentioned in 1 group) and 'being partners' (appeared in 3 groups), both social positions where assigned also to adults. The latest was assigned only to a 14 years old girl. Although we could see in Figure 3 the importance of this concept 'partners' – in Catalan language 'parella' in the focus groups conversations, there was not agreement on its inclusion.

"Però, també veig que la parella seria diferent...una noia de 14 anys no té la mateixa mentalitat ni busca el mateix en una parella que una persona de 40." (FGJ3, P5, girl, middle-high SES, Bcn)

The second most important sphere contains the common positions found within the family: 'son/daughter'; 'siblings'; 'cousins'; 'grandchild' or 'nephews'. It is necessary to precise that more social positions could be identified in this area depending on the type of family or traditions. For example, in one group of teenagers the position of 'godchildren' was also mentioned, although they argued that today could be of less importance due to the decreasing role of religion in our society. One group of teenagers said that children could be also 'caregivers' within the family, especially, when the older son/daughter look after one of their siblings.

Thirdly, the social positions referred to the active citizenship sphere should be highlighted: ‘members of an association/club’, ‘citizens’, ‘volunteers’, all of them also developed by adults. Participants argued that children should be able to fulfill these various positions for their development and their inclusion as members of society, although the type of activity could depend on the age of the child. The following quote expresses this need of children to have an active participation in the society:

“Home, jo crec que totes fan que es desenvolupi la persona, no? Quanta més activitat fas i amb més grups estàs o més participatiu ets a la societat, més et desenvolupes com a persona. Per tant, quantes més possibilitats tingui aquell nen de desenvolupar-se, millor per ell, no? O per la nena.” (FGA5, P5, woman, middle-high SES, Bcn)

Table 17. Common Social Positions for Children agreed by adults and teenagers in the focus groups, 2016.

Category Social Positions Children	Adults		Teenagers		Total	
	Nº focus groups	References	Nº focus groups	References	Nº focus groups	References
Family sphere						<b>34</b>
Son/daughter	3	3	4	4	7	7
Siblings	3	4	4	4	7	8
Cousins	3	3	4	5	7	8
Granchild	3	4	3	5	6	9
Nephews/Nieces	1	1	1	1	2	2
Education sphere						<b>18</b>
Pupils / Students	3	6	4	7	7	13
Classmates	1	1	2	4	3	5
Social sphere						<b>42</b>
Friends	3	3	4	11	7	14
Neighbours	3	3	4	8	7	11
Sports-boy / Sports-girl	3	5	4	5	7	10
Consumers	1	2	1	5	2	7
Active Citizenship sphere						<b>32</b>
Members of an association/club	3	8	4	10	7	18
Citizens	2	6	2	3	4	9
Volunteers	2	4	1	1	3	5
<b>Total</b>	<b>3</b>	<b>53</b>	<b>4</b>	<b>73</b>	<b>7</b>	<b>126</b>

Source: Analysis of the focus groups through NVivo10 qualitative data software.

Finally, being a ‘pupil’ or ‘student’ and ‘classmate’ were also identified as social positions in the education sphere. In the context of school, one focus group also added ‘class delegate’. Other social positions mentioned only by adults were being ‘member of a religious community’, ‘artists’, ‘helpers in domestic tasks’, ‘spectators’, ‘digital users’ or ‘users of public services’. Additional social positions for children mentioned only by teenagers were: being a ‘reference person’ and ‘patients’.

Moreover and, although it was only mentioned in two focus groups in the AMB territory, ‘being children’ in itself appeared in the list, as justified in the following quotation:

“Y un elemento de identidad personal que tiene que ver con el niño, ¿en si mismo? Es decir, el rol como niño. Es decir, estamos categorizando en base a como el niño entra en relación con otros, pero el niño también tiene una identidad como sujeto, ¿no? O como persona.” (FGA6, P5, man, high SES, AMB)

All in all, it is clear that there is a consensus on the common social positions that children should be able to fulfill in order to be members of our society. We observed not only positions that allow participating in it, but also positions that are essential for their own development.

In conclusion, and although we cannot take this results as fully representative in our society, we found within these seven focus groups sufficient consensus and arguments on the social positions that should be taken into account when developing the reference budgets, meaning that the minimum goods and services included should allow the performance of these positions.

Figure 3. ‘Word cloud’ on Children’s Social Positions in the focus groups, 2016.



Source: Analysis of the focus groups through NVivo10 qualitative data software.

Table 18. Common Social Positions for Children agreed by adults and teenagers according to the territory in the focus groups, 2016.

Category Social Positions Children	Barcelona		AMB		Other areas		Total	
	Nº focus groups	References	Nº focus groups	References	Nº focus groups	References	Nº focus groups	References
Family sphere								<b>34</b>
Son/daughter	2	2	3	3	2	2	7	7
Siblings	2	2	3	4	2	2	7	8
Cousins	2	2	3	4	2	2	7	8
Granchild	2	4	3	4	1	1	6	9
Nephews/Nieces	0	0	1	1	1	1	2	2
Education sphere								<b>18</b>
Pupils / Students	2	3	3	5	2	5	7	13
Classmates	2	3	1	2	0	0	3	5
Social sphere								<b>42</b>
Friends	2	2	3	8	2	4	7	14
Neighbours	2	4	3	4	2	3	7	11
Sports-boy / Sports-girl	2	3	3	3	2	4	7	10
Consumers	1	2	1	5	0	0	2	7
Active Citizenship sphere								<b>32</b>
Members of an association/club	2	6	3	9	2	3	7	18
Citizens	2	5	1	3	1	1	4	9
Volunteers	2	4	1	1	0	0	3	5
<b>Total</b>	<b>2</b>	<b>42</b>	<b>3</b>	<b>56</b>	<b>2</b>	<b>28</b>	<b>7</b>	<b>126</b>

Source: Analysis of the focus groups through NVivo10 qualitative data software.

Note: AMB (Barcelona Metropolitan Area) and Other areas (other densely populated areas).

## 2.2. Intermediate Needs

In this project, reference budgets are developed for ten intermediate needs, as previously defined in the theoretical framework (Part II), based on the work of Storms *et al.* (2013) elaborated using the theory of human needs of Doyal & Gough (1984, 1994): (1) healthy food; (2) suitable clothing; (3) rest; (4) leisure; (5) personal hygiene; (6) accessible healthcare; (7) meaningful social relations; (8) safety in childhood; (9) mobility and (10) adequate housing. In order to assess the acceptability of these needs in our context, this issue was discussed with children and adults in seven focus groups organised in densely populated areas in Catalonia in 2016. In this section, the results on this topic are examined.

### *Inquiring about the intermediate needs: building a common consensus*

After discussing the social positions, the activities and the specific goods and services the participants were asked to try to group these resources and make a list of principal needs for an adequate social participation. Although this was an abstract brainstorming exercise, 14 needs were identified by the participants as presented in Table 19. The number of intermediate needs cited per group was between 3 and 10.

Leisure and Healthy Food intermediate needs were the most cited in the discussions. Leisure was mentioned by all seven focus groups, while Healthy Food was cited by five groups. Rest, Health Care, Maintaining Social Relations, Mobility and Housing were identified in three focus groups. The needs less referred to by the participants were Suitable Clothing, Personal Care and Safety in Childhood. The latter was not expressed in this term, but participants mentioned the need of ‘socialization’ linked to childhood. Moreover, four more needs were added by the participants: Work and Life Long Learning by three focus groups, the latter expressed using the concept ‘Education need’; and Security and Time, both only indicated by adults in one focus group.

In each of the focus groups there was a common agreement on the list of the intermediate needs resulting from this brainstorming. Comparing the participants’ list with the list of the 10 intermediate needs identified in the research presented above we ended the exercise. The conclusion was that all participants agreed on the proposed list. Hence, the exercise indicated that there is a social consensus on this issue in our society. In the next chapters the common arguments that justify each need in urban areas in Catalonia is presented quoting the participants.



*Discussion about the essential activities, goods and services for the development of the intermediate needs*

As it is observed in Table 20 the 10 intermediate needs were finally discussed in at least four focus groups. For the analysis the three focus groups developed within the ImPRovE project are also included. That is why the total number of groups is 10, 6 with adults and 4 with teenagers.

The analysis of the focus groups discourse has been carried out using NVivo10 qualitative data software, which also provides information on the number of quotations ('references', the name given in the programme) for each category. Concretely, Safety in Childhood intermediate need was discussed in all focus groups and, so we obtained the largest number of quotations (282 citations). Other needs that have more than one hundred quotations are Healthy Food, Suitable Clothing, Leisure and Maintaining Social Relations, all of them discussed in nine focus groups. Particularly, it was very important to collect focus groups arguments for the last three intermediate needs in order to translate them to concrete basket of goods and services, because not many official guidelines were available in these subjects. Personal Care and Health Care were discussed in 7 focus groups, while Mobility and Housing in 8 focus groups. Finally, Rest was only discussed in 4 focus groups.

All these 10 needs were discussed in children and adults focus groups and also, as shown in Table 21, in all the urban territories studied: Barcelona, Metropolitan Area of Barcelona (AMB) and other densely populated areas in Catalonia. In this way, the seven additional focus groups complemented the first round of consultations done within the ImPRovE project, taking into account children's point of view as well, and served to contrast the previous reference budgets developed for Barcelona for densely populated areas in Catalonia.

The reference budgets have been developed targeting a specific population, the intermediate needs were translated into goods and services for these particular circumstances: adults in working age (working or non-working) and children (a 10 year-old boy and a 14 year-old girl) assumed to be in good health, without disabilities and being well-informed, capables of managing they everydaylife without any extra help and and living in urban areas.

Therefore, the constructed baskets were to contain the essential activities, goods and services required for this reference situation, which are summarized in Table 22, where the total number of references identified in focus groups for each category are included. Table 23 illustrates the associations that emerged throughout the focus groups discussions between the variables that define the reference situation (working status, place of residence, age, sex and health) and the activities, goods and services foreseen for the development of each intermediate need. In the following chapters the content of the baskets using focus groups arguments and how these variables influence their composition is explained in detail.

In conclusion, firstly, from this analysis it is observed that participants in focus groups discussions have found a common agreement on the list of the 10 intermediate needs. Secondly, other needs are recognised by the participants, such as Security and Life Long Learning, which are also integrated in the theory of human needs by Doyal & Gough (1994), but not developed within this research. Work and Time were other needs identified by participants, the latter only by one group composed of adults. Hence, this confirms the theoretical framework and so, reference budgets could be developed from this needs-based approach in our territory. Finally, the analysis of the discussions has brought sufficient information to justify the inclusion of goods and services foreseen in each intermediate need, as well as explore children's opinions on this subject. We would like to highlight that a broader social consensus was achieved with the aim of making reference budgets more robust, although focus group technique is not considered representative.

Table 19. List of the Intermediate Needs identified by adults and children in the focus groups, 2016.

Intermediate Needs	Bcn		AMB			Other areas	
	FGA5	FGJ3	FGA6	FGJ2	FGJ4	FGA4	FGJ1
1. Healthy Food	x		x	x	x	x	
2. Suitable Clothing		x		x			
3. Rest			x	x			x
4. Leisure	x	x	x	x	x	x	x
5. Personal Care				x			
6. Health Care	x		x	x		x	
7. Maintaining Social Relations		x	x		x		
8. Safety in Childhood				x			
9. Mobility			x	x			x
10. Housing	x			x		x	
11. Security						x	
12. Life Long Learning			x	x		x	
13. Time	x						
14. Work	x	x				x	
<b>No. of Intermediate Needs</b>	<b>6</b>	<b>4</b>	<b>7</b>	<b>10</b>	<b>3</b>	<b>7</b>	<b>3</b>

Source: Own compilation from the photographs of the board for each focus group. Note: Bcn (Barcelona); AMB (Metropolitan Area of Barcelona); ZDP (Other densely populated areas in Catalonia). FGA, plus number (code focus group adults); FGJ, plus number (code focus group teenagers).

Table 20. Discussion about the Intermediate Needs in the focus groups by type of group (adults and children), 2014-2016.

Intermediate Needs	Adults			Teenagers			Total		
	No. focus groups	References	% Ref / Total References	No. focus groups	References	% Ref / Total References	No. focus groups	References	% Ref / Total References
Healthy Food	5	88	16,45	4	52	11,45	9	140	14,16
Suitable Clothing	5	108	20,19	4	39	8,59	9	147	14,86
Rest	1	2	0,37	3	8	1,76	4	10	1,01
Leisure	5	62	11,59	4	38	8,37	9	100	10,11
Personal Care	3	36	6,73	4	18	3,96	7	54	5,46
Health Care	5	20	3,74	2	3	0,66	7	23	2,33
Maintaining Social Relations	5	49	9,16	4	83	18,28	9	132	13,35
Safety in Childhood	6	130	24,30	4	152	33,48	10	282	28,51
Mobility	4	31	5,79	4	47	10,35	8	78	7,89
Housing	4	9	1,68	4	14	3,08	8	23	2,33
<b>Total</b>	<b>6</b>	<b>535</b>	<b>100</b>	<b>4</b>	<b>454</b>	<b>100,00</b>	<b>10</b>	<b>989</b>	<b>100,00</b>

Source: Analysis of the focus groups through NVivo10 qualitative data software. Note: in this table focus groups developed within the ImPRovE project are also included. The references include the following categories discussed within each intermediate need: the justification of the need; the activities, goods and services foreseen and the purchasing patterns.

Table 21. Discussion about the Intermediate Needs in the focus groups according to the territory, 2014-2016.

Intermediate Needs	Bcn			AMB			Other areas		
	No. focus groups	References	% Ref / Total References	No. focus groups	References	% Ref / Total References	No. focus groups	References	% Ref / Total References
Healthy Food	3	34	9,58	4	83	19,17	2	23	11,44
Suitable Clothing	3	52	14,65	4	77	17,78	2	18	8,96
Rest	1	1	0,28	2	5	1,15	1	4	1,99
Leisure	4	43	12,11	3	36	8,31	2	21	10,45
Personal Care	3	25	7,04	3	23	5,31	1	6	2,99
Health Care	2	8	2,25	4	13	3,00	1	2	1,00
Maintaining Social Relations	3	56	15,77	4	47	10,85	2	29	14,43
Safety in Childhood	4	109	30,70	4	101	23,33	2	72	35,82
Mobility	3	19	5,35	3	37	8,55	2	22	10,95
Housing	3	8	2,25	3	11	2,54	2	4	1,99
<b>Total</b>	<b>4</b>	<b>355</b>	<b>100</b>	<b>4</b>	<b>433</b>	<b>100</b>	<b>2</b>	<b>201</b>	<b>100</b>

Source: Analysis of the focus groups through NVivo10 qualitative data software. Note: in this table focus groups developed within the ImPRovE project are also included; Bcn (Barcelona); AMB (Metropolitan Area of Barcelona); ZDP (Other densely populated areas in Catalonia). The references include the following categories discussed within each intermediate need: the justification of the need; the activities, goods and services foreseen and the purchasing patterns.

Table 22. Discussion about the activities, goods and services included in the reference budgets for densely populated areas in Catalonia in the focus groups, 2014-2016.

<b>Intermediate needs</b>	<b>Activities, goods and services</b>	<b>No. focus groups</b>	<b>References</b>
<b>Healthy Food</b>		<b>9</b>	<b>75</b>
	Menu		32
	Liquids		13
	Residual category		8
	Physical activity		17
	Kitchen equipment		5
<b>Suitable clothing</b>		<b>9</b>	<b>44</b>
	Clothing items		34
	Maintenance, storage, repair		10
<b>Rest</b>		<b>4</b>	<b>10</b>
<b>Leisure</b>		<b>9</b>	<b>77</b>
	Holidays (out of home)		28
	Domestic leisure		16
	Leisure activities, adults		33
<b>Personal Care</b>	Personal care items	<b>7</b>	<b>42</b>
<b>Health Care</b>		<b>7</b>	<b>18</b>
	Health products		11
	Health services		7
<b>Maintaining Social Relations</b>		<b>9</b>	<b>115</b>
	Inviting family & friends		12
	Going out for a meal		13
	Cultural celebrations		15
	Computer & Internet access		58
	Printer & accessories		4
	Mobiles adults		10
	Citizenship		3
<b>Safety in Childhood</b>		<b>10</b>	<b>274</b>
	Social & Cultural participation		114
	Mobile phones children		45
	Birthday party		20
	Toys and presents		24
	Education		31
	Pocket money		40
<b>Mobility</b>		<b>8</b>	<b>67</b>
	Public transport		20
	Holiday journey		9
	Bicycle budget		14
	Private transport		24
<b>Housing</b>		<b>8</b>	<b>17</b>
	Utilities		11
	Other housing conditions		6

Source: Analysis of the focus groups through NVivo10 qualitative data software.

Note: in this table focus groups developed within the ImPRovE project are also included. Social & cultural participation includes (day trip, youth association and cultural activities).

Table 23. Variables that influence the activities, goods and services foreseen for the fulfilment of the intermediate needs identified by focus groups, 2014-2016.

Intermediate needs	Activities, goods and services	Working status	Place of residence	Age	Sex	Health
Healthy Food	Menu	×				×
	Liquids		×			
	Residual category			×		
	Physical activity		×	×		
	Kitchen equipment					
Suitable clothing	Clothing items			×		
	Maintenance, storage, repair					
Rest						
Leisure	Holidays (out of home)	×				
	Domestic leisure			×		
	Leisure activities, adults					
Personal Care	Personal care items			×	×	
Health Care	Health products					×
	Health services					×
Maintaining Social Relations	Inviting family & friends					
	Going out for a meal					
	Cultural celebrations					
	Computer & Internet access	×		×		
	Printer & accessories	×		×		
	Mobiles adults					
	Citizenship					
Safety in Childhood	Social & Cultural participation	×	×			
	Mobile phones children			×		
	Birthday party			×		
	Toys and presents		×			
	Education			×		
	Pocket money			×		
Mobility	Public transport		×	×		
	Holiday journey					
	Bicycle budget		×			
	Private transport		×			
Housing	Utilities					
	Other housing conditions			×		

Source: Analysis of the focus groups through NVivo10 qualitative data software.

### **3. The Healthy Food basket**

#### **3.1. Specific methodology**

The Healthy Food basket<sup>36</sup> comprises the conversion of the healthy eating intermediate need identified by Doyal & Gough (1984) and includes the goods and services necessary to guarantee an adequate nutrition: food products and also the minimum kitchen equipment in order to prepare, serve, eat, store and conserve food. This was the composition of the Healthy Food basket established in the framework of the ImPRovE project. Thus, psychological and emotional functions of food have been taken into account in the baskets Safety in Childhood, Maintaining significant social relations and Rest and Leisure (Goedemé *et al.*, 2015; Storms *et al.*, 2013), as explained in the next chapters. Additionally, in order to construct the basket standardized for a reference family we assumed adults and children living in urban areas, being in good health and with competences to prepare and buy food economically.

In order to compose the country-specific food basket within the ImPRovE project we relied on a nutritionist who determined the types, amounts and frequencies of the different food products for the different family members based on the current Spanish dietary recommendations. For adults the guidelines by the Spanish Society of Community Nutrition (SENC) and the Spanish Agency of Food Security and Nutrition (AESAN) were used (SENC, 2004). Regarding children the reference was the Pilot Programme in Schools for Healthy and Physical Exercise and against Obesity (PERSEO) for children and adolescents (Perez-Rodrigo, Calderon, Campos-Amado & Aranceta, 2013). According to these standards a weekly menu was developed and its feasibility and acceptability was contrasted in three focus groups. The physical daily activity foreseen in the guidelines was also discussed in the focus groups, as well as the kitchen equipment (Carrillo, Cussó & Riera, 2016a). The last step was to price the items. The retailer selected was widespread across Spain and with prices around 10% higher than the cheapest retailer in order to consider some degree of freedom for families to buy food. This decision was based on a comparative study between retailers by the Spanish Consumers' Association (OCU, 2012).

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<sup>36</sup> This chapter is partly based on results already published in Carrillo *et al.* (2016a) and Cussó, Carrillo & Riera (2016).



In this case, although very detailed arguments on the suitability of the Healthy Food basket were compiled in the first round of focus groups, the focus groups from the second round have explored the common consensus on this need between adults and children in densely populated areas in Catalonia. In this way, some determinants from their point of view emerged such as the place of residence, the working status, age and health, which might influence the activities, goods and services included in the basket.

This chapter is divided in four sections. Firstly, the development and composition of the food basket based on the dietary guidelines and expert advice is described. Secondly, decisions regarding the choice of shops and the pricing procedure are explained. Thirdly, focus groups arguments are presented in densely populated areas in Catalonia, which validate the composition of the basket done by the expert advice. Finally, an overview of the Healthy Food budget for ten family types is presented.

### **3.2. Food-based dietary guidelines**

The Food Based Dietary Guidelines (FBDG) for the Spanish population were the starting point for developing the Healthy Food basket (SENC, 2004). These recommendations are built upon the current scientific evidence on the nutritional needs of healthy individuals and the main diet-related public health challenges, as well as the cultural habits of the Spanish population are taken into account. Therefore, they provide guidelines about the necessary average portions and frequencies of consumption of the different foods in order to promote healthy eating and regular physical activity. These recommendations are illustrated through the Spanish Healthy Eating Pyramid composed of seven basic food groups: (1) grains and potatoes, (2) vegetables, (3) olive oil, (4) dairy products, (5) fish, meat, eggs, legumes, nuts, (6) processed meat products and (7) sweets. Additionally, it includes water, physical activity and wine or beer in moderation for adults. As these guidelines only specify recommended portions and frequencies of intake for adults, we relied on the dietary objectives laid down in the Guide for Families of the PERSEO programme (Perez-Rodrigo *et al.*, 2013) to determine the type, amount and frequencies of the different food products to be included in the case of children and adolescents. The recommendations are summarised in Table 24.

Table 24. Food-based dietary guidelines used to develop the Healthy Food basket.

	Recommended frequency	Portion weight for adults (1)	Portion weight for child (6-10 years old) (2)	Portion weight for child (11-14 years old) (2)
Potatoes, rice, bread, pasta	4-6 portions a day	60-80 g rice, pasta 40-60 g bread 150-200 g potatoes	60-80 g rice, pasta 40-60 g bread 150-200 g potatoes 30 g breakfast cereals	60-80 g rice, pasta 40-60 g bread 150-200 g potatoes 30 g breakfast cereals
Vegetables	≥2 portions a day	150-200 g	200 g	200 g
Fruits	≥3 portions a day	120-200 g	120-150 g	120-150 g
Olive oil	3-6 portions a day	10 ml	10 ml	10 ml
Dairy products	2-4 portions a day	200-250 ml milk 200-250 g yogurt 40-60 g mature cheese 80-125 g cottage cheese	250 ml milk 125 ml yogurt 30-40 g mature cheese 80g cottage cheese	250 ml milk 125 ml yogurt 30-40 g mature cheese 80 g cottage cheese
Fish	3-4 portions a week	125-150 g	100-120 g	140-150 g
Lean meat	3-4 portions a week	100-125 g	80-100 g	120 g
Eggs	3-4 portions a week	100-125 g	60-120 g	60-120 g
Legumes	2-4 portions a week	60-80 g	60 g	80 g
Nuts	3-7 portions a week	20-30 g	20-30 g	20-30 g
Fatter and processed meat	Occasional and moderate	-	-	-
Sweets and snacks	Occasional and moderate	-	-	-
Butter and pastries	Occasional and moderate	-	-	-
Water	4-8 portions a day	200 ml approx.	250 ml approx.	250 ml approx.
Beer or wine	Optional and moderate	50-100 ml wine 100-200 ml beer	-	-
Physical activity	Daily	≥30 minutes	60 minutes	60 minutes

Source: (1) SENC (2004); (2) Perez-Rodrigo *et al.* (2013).

As a rule, the nutritionist included the foods that according to the Spanish National Survey on Nutritional Intake (Fundación Española de Nutrición, 2013) are consumed below the recommendations in greater proportion than those whose intake is excessive. At the same time, as the purpose was to build a balanced food basket for a minimum budget, the cheapest option was selected from the available preferential products. For instance, although olive oil is the recommended fat in Spain due to its cardiovascular benefits and because it is abundantly produced in our country, we also included little amounts of sunflower oil (because it is cheaper) as well as nuts (because they are consumed below the recommendations). The same rationale was applied to the inclusion of fresh vegetables rather than frozen or canned vegetables; and fresh rather than frozen fish.

In order to determine the quantity of each food product for each profile (boy, girl, man, woman), we started from the amounts mentioned in Table 24, establishing the following eight categories: liquids, starches, vegetables, fruit, dairy, meat/fish/eggs, fat and residual. For the first seven, we included the most common foods consumed in Spain, in the frequencies recommended in the FBDG. The Spanish FBDG do not provide specific recommendations for each gender. Yet, it is known that this is one of the factors that determines the nutritional needs. Thus, to determine the amount of each food product to give to each profile, we took the lower portion threshold as a reference for women, while the upper threshold was applied to men. For children, recommendations are formulated for the age intervals of 6 to 10 years of age and 11 to 14 years of age; therefore, the upper reference was used in our both cases (10 year-old boy and 14 year-old girl).

In order to compose varied baskets of fruits, vegetables, meat and fish, we included at least seven different food products per week, the choice of these specific products was based on their price. We calculated the average price of the 7 cheapest products and next calculated the average price of all the other products in the same food category available at the chosen retailer, except for the 10% most expensive products. Finally, we calculated the average price for the food category weighting the average price of the seven cheapest products 5 times a week and the others 2 times.

Net amounts of fresh fruits, vegetables, potatoes, fish, fatty meat and eggs were increased with a waste percentage of respectively 22%, 28%, 10%, 30%, 20% and 12%

(Hoge Gezondheidsraad, 2005). This percentage was 30% in the case of fish and 20% for red meat. The waste fraction was not considered for lean meat, since it is very common in Spain to buy meat already prepared for cooking. The calculations were made using ready to cook lean meat portion amounts and prices.

The residual category was filled with those products that are part of a balanced diet, but for which there are no recommendations. This category included cocoa powder, chocolate, jam, sugar, spices, salt, pepper, flour and sauces such as mayonnaise, ketchup and vinegar. These products were widely accepted in the focus groups discussions.

The consumption of delicacies such as cakes, crisps, biscuits, take-away meals or eating out are very spread in the Spanish society. However, evidence of their effect on health lay bare the need of reducing their intake because of their high sugar, salt and unhealthy fats content (World Health Organization, 2002 & 2004). Based on this fact, and because the budgets can have an educative function, these products have not been included here, but in the baskets ‘Maintaining significant social relations’, ‘Safety in Childhood’ and ‘Leisure’, as focus groups recognised that these products have a social function. Consumption of alcohol on social occasions was considered within these other baskets too. Only the optional amount of wine and beer contemplated by the AESAN-SENC guidelines was included here.

The kitchen equipment required to prepare, eat, store and conserve food was also included in this basket. In this case, we relied on a common list for all countries based on the Belgian experience (Storms, 2012). The kitchen equipment needed is quite universal in our European context, but we tested the adequacy of the equipment during the focus groups discussions as explained below and some variations were introduced due to cultural habits.

In addition to a healthy diet, physical activity is essential for a good health and to maintain the energy balance. Daily activities for 30 minutes for adults and 60 minutes for children and teenagers are recommended in the SENC guidelines. Free and paid options to perform physical activity were also discussed within the focus groups.

### **3.3. Choice of shops and pricing procedure of the Healthy Food basket**

Once the initial basket was developed, we priced the different items in the basket. As it is highly impractical to frequent different shops for regular purchases such as food, a choice was made by the different participant countries to consider that people make combined purchases from a single store. In the case of Spain, this choice was made upon a study of the Spanish Consumers' Association (OCU, 2012) in which the prices from different retailers in Spain were analysed and compared in different ways: the cost of a "basic basket" (which included white-label products), the cost of a "typical basket" (that compared products of exactly the same brand and packaging), and the cost of a "fresh basket" (which included fresh fruit and vegetables). This comparison was made country-wide and also for the main cities in Spain. We selected a retailer easily found in different cities in Spain which had, for the three baskets considered in the OCU study, prices around a 10% higher than the cheapest retailer, which gives a little margin for people to choose where to do their shopping while still buying at a low price. Besides, it is a retailer very conveniently accessible in almost every city in Spain, with a substantial number of points of sale normally placed inside the cities themselves -while other supermarkets with slightly lower prices, are normally located in big shopping areas at the outskirts, thus not being easily reachable for all people, especially for people who do not own a car. By considering the household type, while taking due account of the required quantity, quality and the storage life, we were looking for the appropriate packaging at the lowest possible price. Prices vary widely across different areas of the country, so it is necessary to bring this phase of the research to the local level. As mentioned above, the reference city for this study was Barcelona, thus the prices were collected in this location.

In absence of studies comparing the prices of retailers of household items, the choice of the store to buy the kitchen equipment was made by the research team after comparing some of the most widespread chains. When possible, we relied on multinational brands, which could allow cross-country comparability. The actual pricing of the whole Healthy Food budget was done in July 2013 through the online shop platforms of the selected retailers.

### **3.4. Content: common consensus on goods and services**

In order to check the acceptability and feasibility of the Healthy Food basket elaborated through the guidelines and expert advice, three focus groups within the framework of the ImPRovE project were conducted with the aim of gathering opinions and arguments about some of the items included and if there was something lacking or redundant.

The discussion within these focus groups was based on specific questions about unclear points of the whole healthy food basket, the residual food category within it, the kitchen equipment and the practice of physical activity. This information has been complemented with a second round of focus groups that took into account both adults' and teenagers' opinions in densely populated areas in Catalonia with the purpose to validate the Healthy Food Basket for this extended area. Participants were asked about the following topics: justification and acceptability of the menu, other functions of food, physical activity and purchasing patterns. At the same time, this deep analysis has raised some determinants that might influence the goods and services foreseen in the basket.

In all focus groups, the participants were shown a list of the food products and kitchen equipment, as well as an example of a five meals a day weekly menu either for adults and children designed taking into account the guidelines. In the case of teenager focus groups, we excluded the questions regarding kitchen equipment. They were asked about whether those inventories were appropriate, acceptable and feasible for a reference family of four members (two adults, one primary school boy and a secondary school girl) and also about the assumption of cooking at home on a daily basis. The aim was not focusing on the individual preferences or particular situation of each participant, but to collect reasons and arguments in favour or against the inclusion of every item for an adequate social participation.

In the next paragraphs, focus groups opinions regarding the different topics are presented, as well as the possible variables that according to participants might influence the composition of the basket.

## **Justification and acceptability of the menu**

Children and adults living in densely populated areas in Catalonia agreed that healthy eating is an essential need to maintain a good health. They mentioned that to follow a balanced diet is important to meet this requirement, as well as developing a healthy life style, such as doing sport activities and establishing regular timetables for eating:

“M: Com ha de ser aquesta alimentació? P1: Variada. P4: Equilibrada”. (FGJ2, P1, boy, middle SES; P4, girl high SES, AMB).

“M: L’alimentació per què seria important aquí? P4: Doncs, per la salut. Si no menges, no beus...” (FGJ1, P4, boy, middle-high SES, ZDP).

“Clar una persona amb salut, vol dir que és una família que es cuida, que va al gimnàs, no? Que tenen bons hàbits d’alimentació, horaris... ” (FGA5, P7, men, middle-high SES, Bcn).

The five-meals a day menus presented were seen as highly desirable and affordable for both adults and children as shown in the following quotes:

“El que sí que és veritat és que és súper equilibrat, que els meus fills no mengen tant bé i em gasto més!” (FGA1, P3, woman, middle-high SES, AMB).

“M: Què us sembla aquest menú? Seria viable i acceptable per la família de referència? P1: Jo crec que de llarg, però no sé si s’aplicaria, almenys jo, tan variat, tan variat, crec que no...” (FGJ2, P1, boy, middle SES, AMB).

The proposed menus were seen as convenient to cook at home, even if you work out of home. Although it was pointed out by some participants that for reasons of lack of time sometimes following strictly the requirements for a balanced is difficult for both adults and children, particularly for breakfast.

“A ver, lo más normal sería de que en una familia se hiciera un menú así cada día, y que cada persona comiera un menú así, lo que pasa que no lo hacemos. Hay falta de tiempo. [...] Porque cocinas, normalmente trabajas y cocinas por la noche para dejarte la comida hecha para el día siguiente. El desayuno, como vas con prisa, ¡bíbete la leche y sal corriendo, eh! ¡Que llegas tarde al colegio!” (FGA6, P3, woman, middle-low SES, AMB).

In addition some participants mentioned that having allergies would modify the menus presented. As the healthy food budget is composed for families in good health this requirement is not taken into account by the current research. Despite these later considerations, no significant changes were suggested by the focus groups, indicating the adequacy of the menus presented.

Regarding liquids participants in focus groups agreed to include water, as well as the small daily optional amount of wine or beer contemplated in the Spanish Healthy Eating Pyramid. Alcohol consumption was seen as something linked to our culture specially when inviting someone at home or going out as shown in the following quote:

“No es que sea necesario, es como un acto social. Cuando quedas con alguien sea en casa o sea a fuera, normalmente lo que haces es tomar algo que no sueles hacer, es una manera de relacionarse.” (FGA3, P6, woman, low SES, Bcn).

As this is something related more to social functions of meals and social positions such as ‘being friends’ this will be included in the Maintaining Social Relations basket. In the case of water it was difficult to find common consensus on whether to include tap water or the cost of bottled water. It seemed to be a question of personal preferences. Although people admitted that there is a trend of buying bottled water, particularly in Barcelona, participants agreed that tap water is drinkable in our context. Thus, families could rely on it. As illustrated in the following quote buying bottled water is not as essential as other products:

“Como hay agua en el grifo, no la veo tan importante para comprarla como otras cosas como la leche, la carne para los niños y la familia.” (FGA3, P5, women, low SES, Bcn).

For these reasons, and to guarantee families’ choice, the price of bottled water was estimated separately (Carrillo *et al.*, 2016a). This also allows comparing our results for the Healthy Food basket with the ones obtained in the other countries participating in the ImPRovE project where bottled water was not added.



## **Residual category and other functions of food**

The food-based dietary guidelines do not specify the amounts for products such as flour, cocoa, coffee, spices, among others, although according to focus groups these elements are perceived as necessary because of their gastronomic and cultural function in our context. Therefore, these products were added in the residual category for all family types. As shown in the following quote some of these items were considered really important in order to have a decent standard of living:

“Cuando empiezas a notar que ya no puedes tomar café, galletas variadas o tener una tableta de chocolate, porqué a todos nos gusta el dulce, algo va mal. Allí sí que es cuando tienes la señal que ya no estás viviendo dignamente. Porqué para mí no es un capricho, ni un lujo tener un dulce en casa, para ti mismo o para tus hijos que te lo pueden pedir”. (FGA1, P5, man, middle SES, AMB).

These words also illustrate the emotional and social functions of food. Although considered in the highest part of the Spanish Healthy Eating Pyramid in small amounts, participants in densely populated areas in Catalonia agreed to include them, especially, for children. For example, the most suitable occasions to consume or share this type of products were, according to focus groups: when going out with the family, when celebrating something or also when going out with friends. In this way, these resources are important for developing the social positions such as ‘being member of a family’ or ‘being friends’ and so, to have an adequate social participation:

“Yo creo que cuando compartís algo con la familia, por ejemplo, un refresco en un fin de semana, les hace mucha ilusión [se refiere a los niños/as], hace como un extra, un premio... Cuando compartes con la familia una fanta, con la niña, es un momento que estamos juntos, para ella, es un premio, un momento de felicidad.” (FGA3, P5, woman, low SES, Bcn).

“M: En quines ocasions, per exemple, introduiríem aquests altres menjars o extres de la part petita de la piràmide? P4: Jo crec que al final, tothom cada dia pren una mica. M: Quan? Quan ho faríem? P6: Festes d’aniversari. P2: Home, quan quedes amb els amics, tenint en compte que tenen catorze i deu anys.” (FGJ2, P4 & P6, girls high SES; P2, boy, middle-high SES, AMB).

Finally, these products are taken into account in the Safety in Childhood (e.g. day trip; birthday party), Maintaining significant social relations (e.g. inviting family and friends) and Rest and Leisure (e.g. holidays and domestic leisure).

### **Physical activity**

In agreement with the guidelines participants in the focus groups also argued that performing physical activity daily is important for both adults and children. Additionally, as pointed out in the previous chapter being a ‘sports-boy/girl’ or ‘sport-man/woman’ was one of the recognised common social positions to develop.

Nevertheless, paid physical activity options were considered expensive in cities and not suitable for a minimum budget (e.g. in Barcelona 73-78 Euros/month for the whole family or 41-45 Euros/month for the adults is estimated (Ajuntament de Barcelona, 2013)).

“Hay cuotas y cuotas y ciudades que lo reducen al mínimo. Si fuese el caso, pues, perfecto, pero si no, pues podría casi excluir a mucha gente.” (FGA4, P1, man, middle-high SES, ZDP).

However, in urban areas focus groups proposed the practice of alternative free of charge outdoor activities widely available that could be easily introduced in the daily routine, without spending a lot of time and money:

“Alternatives al gimnàs es sortir a caminar, anar a córrer, en bicicleta, baixar de l'autobús una parada abans, pujar escales...(FGA1, P3, woman, middle-high SES, AMB).

“P3: Els pares molts treballen en oficines, quan surten han de tornar a casa i cuidar dels nens i tenen poca estona. P1: Si tu et proposes anar cada dia anar a córrer mitja hora pel teu barri, ho pots fer. P6: Anar al gimnàs potser et suposa més temps!” (FGJ4, P3, boy, middle-high SES, P1, girl, high SES & P6, girl, middle-high SES, AMB).

In the case of children it was agreed to include a regular participation in a sport activity, not only to the requirement for the recommended physical activity, but also to promote their social participation. This is guaranteed through the membership in a youth association/club foreseen in the Safety in Childhood basket.

## **Kitchen equipment**

It includes the necessary kitchen equipment to prepare, eat, store and conserve the various food ingredients. According to focus groups participants we did not include egg cups, because they are rarely used in Spain. Likewise, the coffee maker was changed for the most conventional type in our context.

## **Common food purchasing patterns**

Focus groups from the second round also approved to purchase the majority of food products in supermarkets. Both children and adults living in densely populated areas in Catalonia agreed that it is the most convenient option for shopping faster and economically:

“És que hi ha productes com el peix o la carn que si aniries a un altre lloc. Però, la majoria de coses les comprem al súper”. (FGJ3, P3, girl, middle-high SES, Bcn).

“P4: El supermercat l’avantatge que té és com que la gent treballa tant i no hi ha temps, és com més ràpid, i està tot allà...P2: És més econòmic. Sí, està tot allà en una mateixa botiga. El mercat és un fet puntual, o sigui, de tant en tant.” (FGJ4, P2 & P4, boys, middle-high and high SES, respectively, AMB).

“Perquè potser les coses del barri estan *guai*, però al súper estan a meitat de preu.” (FGA4, P4, man, middle-high SES, ZDP).

Therefore, purchasing in the market was seen as something occasional. People also valued that the supermarket was placed inside the city center or were reachable by public transport. They agreed it was feasible for a family composed of four members to do the weekly shopping in this way.

### 3.5. Overview of the total Healthy Food basket

The Healthy Food basket has been developed from a normative approach, starting from the Spanish food-based dietary guidelines, adapted by using nutritionist advice and, finally, its acceptability and feasibility was checked throughout focus groups discussions. The Healthy Food basket has not the purpose to prescribe what people should eat, but to calculate a budget for healthy eating in our context for thoroughly-described hypothetical family types. In order to interpret the results, it is also important to bear in mind that the basket has been composed for adults and children living in urban areas, being in good health and with the necessary competences to prepare and buy food economically. Any change in these circumstances defined for the reference family would influence the final cost (e.g. having allergies).

In Table 25 and Figure 4 can be observed that this budget ranges from 127,30 Euros per month in the case of a single woman to 556,46 Euros per month for a family composed of two adults and two children. Thus, couples with two children will need 4,37 times more budget to ensure a healthy diet than a single woman, which illustrates inexistent economies of scale. If the cost of the kitchen equipment is added the monthly budget would increase between 11,18 Euros and 13,78 Euros per month depending on the type of family and so, in this case, bigger families benefit from economies of scale. Moreover, according to Carrillo *et al.* (2016a:11), if the cost of bottled water is included the monthly cost would increase around 4,33 Euros per person and month.

As illustrated in Table 26 categories such as fruit, dairy and meat, fish and eggs are the ones with the highest weight relative to the total Healthy Food budget for all family types. Conversely, liquids and fats have the lowest weight relative to the total cost without kitchen equipment. The budget for a single man is higher than a single woman because the amounts needed in each food category are higher too, except for residuals. The dietary guidelines do not specify recommendations for each gender, but according to the nutritionist's advice the lower portion threshold was applied to women, while the upper threshold was assigned to men. For children aged 14 higher daily amounts of meat and fish were taken into account, while a small amount of fats was foreseen.

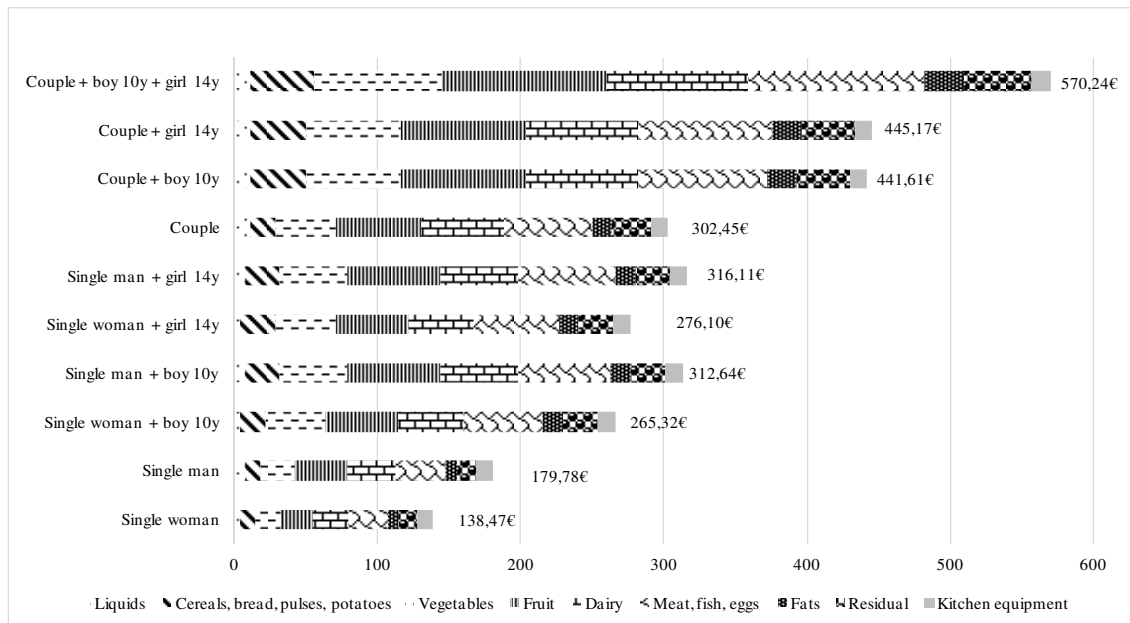
Consequently, in general the composition of the basket depends on the number of adults in the household and their sex, as well as the number of children and their age according to guidelines and expert advice. However, other factors signalled in the focus groups that might influence the activities, goods and services in the Healthy Food basket were the health and working status for the acceptability and feasibility of the menu; the place of residence for liquids, physical activity and age for the residual category and physical activity.

Table 25. Total monthly budget of the Spanish Healthy Food Basket for various family types according to different food categories. Barcelona reference city, 2013.

Healthy food basket per food category & kitchen equipment	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Liquids	3,52	6,97	3,52	6,97	3,52	6,97	10,40	10,40	10,40	10,40
Cereals, bread, pulses, potatoes	10,72	10,57	18,21	23,87	25,44	23,87	18,36	39,56	39,56	44,56
Vegetables	17,98	23,96	41,87	47,88	41,87	47,88	41,87	65,83	65,83	89,72
Fruit	22,29	37,14	50,14	65,00	50,14	65,00	59,43	87,29	87,29	115,15
Dairy	25,03	33,55	45,46	54,05	45,46	54,05	57,98	78,41	78,41	98,85
Meat, fish, eggs	27,17	35,32	55,88	64,63	59,94	68,10	61,21	90,00	94,06	122,91
Fats	7,03	7,52	14,26	14,26	13,77	14,26	14,26	21,00	20,50	27,73
Residual	13,57	13,57	23,83	23,83	23,83	23,83	26,80	36,98	36,98	47,15
Kitchen equipment	11,18	11,18	12,15	12,15	12,15	12,15	12,15	12,15	12,15	13,78
<b>Total budget (€) /month without kitchen equipment</b>	<b>127,30</b>	<b>168,61</b>	<b>253,17</b>	<b>300,49</b>	<b>263,96</b>	<b>303,96</b>	<b>290,30</b>	<b>429,46</b>	<b>433,02</b>	<b>556,46</b>
<b>Total budget (€) /month with kitchen equipment</b>	<b>138,47</b>	<b>179,78</b>	<b>265,32</b>	<b>312,64</b>	<b>276,10</b>	<b>316,11</b>	<b>302,45</b>	<b>441,61</b>	<b>445,17</b>	<b>570,24</b>

Source: Based on Carrillo *et al.* (2016a), except for liquids as bottled water is not included.

Figure 4. Total monthly budget of the Spanish Healthy Food Basket for various family types by food category. Barcelona reference city, 2013.



Source: Based on Carrillo *et al.* (2016a), except for liquids as bottled water is not included.

Table 26. Weight of the different categories of the Healthy Food budget excluding the kitchen equipment (%). Barcelona reference city, 2013.

Healthy food basket per food category & kitchen equipment	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Liquids	2,76	4,13	1,39	2,32	1,33	2,29	3,58	2,42	2,40	1,87
Cereals, bread, pulses, potatoes	8,42	6,27	7,19	7,94	9,64	7,85	6,33	9,21	9,14	8,01
Vegetables	14,12	14,21	16,54	15,93	15,86	15,75	14,42	15,33	15,20	16,12
Fruit	17,51	22,03	19,81	21,63	19,00	21,38	20,47	20,32	20,16	20,69
Dairy	19,66	19,90	17,96	17,99	17,22	17,78	19,97	18,26	18,11	17,76
Meat, fish, eggs	21,34	20,95	22,07	21,51	22,71	22,40	21,08	20,96	21,72	22,09
Fats	5,52	4,46	5,63	4,75	5,21	4,69	4,91	4,89	4,73	4,98
Residual	10,66	8,05	9,41	7,93	9,03	7,84	9,23	8,61	8,54	8,47
<b>Total budget (€) /month without kitchen equipment</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>

Source: Based on Carrillo *et al.* (2016a), except for liquids as bottled water is not included.



## **4. The Suitable Clothing basket**

### **4.1. Specific methodology**

The Suitable Clothing basket includes items that protect against all weather conditions and that allow people to participate from activities foreseen in other baskets in order to develop their various social positions at the same time that can provide a specific identity (Goedemé *et al.*, 2015a). Thus, the basket contains summer, winter and mid-season clothes, including shoes, and some accessories and the necessary elements for maintenance, storage and repair.

Specific guidelines that establish the adequate number of items of clothing per person are not available in Spain. We live in a context where consumption of clothes is very high (CRIC, 2012a), therefore it makes it difficult to standardize the number of clothes needed at the minimum. In fact, some organizations claim for a more responsible and sustainable consumption of clothes in our territory (Ajuntament de Barcelona, 2008; Sales, 2011; SETEM-Campanya Ropa Limpia, 2005). Additionally, clothing is a very subjective need: besides dirt, physiological or personality questions, the frequency of changing pieces of clothes may also have an influence.

In order to complete the clothing basket social workers and socio-educative professionals involved in charity organizations were interviewed. This information was useful to make the necessary adjustments to translate this need into a list of goods and services needed to develop a suitable clothing basket for the reference city (Barcelona).

The second source of information to grasp the cultural habits for the clothing basket was focus group discussions. First, the discussion served to agree on two main points: (1) the basket should include multifunction clothes to be worn on formal and informal occasions to enable people to develop their different social positions, (2) the minimum number of clothing items should respond to hygiene criteria, national cultural habits and practical considerations (Goedemé *et al.*, 2015a). These common criteria proposed in the ImPRovE project guided the selection of clothing items, accessories and their maintenance and repair.

When confronted with the list of items included in the basket, the participants ensured that the number of items and the chosen clothing reflected the needs and cultural habits of the population for the different profiles (man, woman and children). The list of clothes included coats, trousers, dresses and skirts, shirts and T-shirts, sweaters, sportswear, underwear, socks, accessories and shoes, as well as products for maintenance, storage and their repair agreed in the discussions. In this case, although very detailed arguments were compiled during the first round of focus groups regarding clothing items, participants in the second round in densely populated areas in Catalonia have reached a common consensus around the need of a clothing basket for an adequate social participation in our society.

Finally, although some surveys on clothing consumption are available (GESOP, 2011; SETEM-Campaña Ropa Limpia, 2005), we also relied on focus groups arguments to establish the shops where the items selected for the basket would be priced. Here, also focus groups from the second round have helped a better contextualization of the purchasing patterns from both children's and adults' point of views. The choice of shops was linked to preferences about quality or quantity of clothing items. Participants agreed that variation is important and they would preferentially look for products that are good value for money. However, they also said that a minimum quality is important to have decent-looking clothes for a longer time. The possibility of including second hand goods was explored, but dismissed because its relative eventuality as a shopping option for clothes in our context.

For the pricing procedure of the clothing basket the third cheapest item of a certain quality in a shop was chosen in order to take into account a certain degree of freedom of choice for families. In addition, we added a 10% discount on the price of new clothes since people tend to buy clothes during sales periods.

In the following sections, the composition of the clothing basket is described. The chapter is divided in seven sections. We start contextualising the weather conditions and the justification of the clothing need. Then, the specific content of the basket is presented including the number of items, their qualities and life spans, as well as the products for the maintenance, storage and repair. Finally, the choice of shops and the pricing procedure is detailed and the overview of the total budget for this basket is presented.

## 4.2. Weather conditions

Spain is a country with a wide variety of climatic areas. The geographic situation and orographic conditions cause a heterogenic climate across the territory. The identified climate zones are Oceanic (focused in the north of Spain), Continental (the center of Spain and lands far from the coast), Subtropical in Canary Islands and Mediterranean, which is the one that predominates in Catalonia (Borràs & Ubach, 1991), though other microclimates can be found, such as alpine climate in the Pyrenees. Across the Catalan territory the average annual temperatures oscillate between 0°C in the Pyrenees and 17°C in the coast (Wikipedia, 2016).

Particularly, the area of Barcelona has Mediterranean climate, maritime and temperate. Winters are very mild and dry, and it rarely snows or frosts. In Barcelona city the coolest month is January, with an average temperature of 9,2°C (estimated between 1981 and 2010) (AEMET, 2013). Spring and autumn are the seasons where the weather is more unstable and precipitations take place, although temperature is also very mild. Summers are hot (July and August are the hottest months with an average temperature around 24°C in the same period (AEMET, 2013). However, due to high levels of humidity summers are very sticky, particularly at night (Moran-Ocerinjauregui *et al.*, 1982).

Considering the previous description, Barcelona's area climate is mild. Yet, cold snap episodes might appear sporadically in winter (Borràs & Ubach, 1991). Consequently, people should be prepared to protect themselves from diverse weather conditions. Therefore, and following also the criteria that clothes should be multifunctional, the clothing basket considers items that protect against all weather conditions and that allow people to participate in activities foreseen in other baskets. Nevertheless, the discussion of some elements of the clothing basket with the participants in the focus groups assure that the items and amounts chosen reflect the needs and cultural habits of the population in densely populated areas in Catalonia.

### **4.3. Content: common consensus on goods and services**

#### **Justification of the clothing need**

A specific guideline to establish the adequate number of items of clothing per person has not been established in our country. On the contrary, numerous studies highlight the need for a more responsible and sustainable consumption of clothes in our context. These reports focus on recommendations about how to reduce, reuse, and recycle clothes (what has been called the 3 R's campaign) and claim for a fair textile production and industry (Ajuntament de Barcelona, 2008; Sales, 2011; SETEM-Campanya Ropa Limpia, 2005).

It is estimated that on average approximately two items of clothes per month and per person are bought in Spain (including the wide variety of items, from socks to coats). Since the beginning of the economic crisis in 2007 the consumption of clothes has decreased, but it is higher than in the nineties (CRIC, 2012a). Participants in focus groups in densely populated areas in Catalonia also pointed out this issue and agreed on a rational consumption of clothes that should guarantee a minimum variety of clothing items in order to have a good appearance for an adequate participation in the society:

“Bueno, aquí parlaríem del que és mínim per viure, perquè igual no necessitem els texans. Vull dir que a vegades també caldria limitar una mica el que realment necessitem i ens posem.” (FGA1, P3, woman, middle-high SES, AMB).

“I depèn de la roba que vulguis portar. Amb quatre texans i cinc samarretes ja passes, i hi ha gent que a lo millor té sis bambes!” (FGJ3, P6, boy, middle-high SES, Bcn).

“Però, es veritat, hi ha gent que et mira malament perquè a vegades no vas bé econòmicament i no et pots vestir d'una altra manera perquè no tens ho tens bé econòmicament...” (FGJ1, P4, boy, middle-high SES, ZDP).

In a context of high level of consumption of clothes, it is difficult to fix the minimum amount of clothing items. Clothes should serve to protect against weather conditions, but also as pointed out in the latest quote clothes construct our personal identity, which is projected to other people. Thus, it is clear that a sufficient variety of clothes is needed to respond to the different social positions people should be able to develop in our society and agreed on the focus groups (e.g. ‘being a student’, ‘worker’, ‘sport man/woman’, etc).

In addition, clothing is a very subjective need: some people like to change their clothes more frequently, although the clothes may not be dirty. It is also a question of personality and the way to present the self; other people perspire more and need to change their clothes more often. Hence, it is something very personal and it is not easy to standardize. In any case, participants in focus groups in densely populated areas in Catalonia manifested, as showed in the next quotes, that the number of items of clothing is clearly subjective and linked to hygiene:

“Pero si tuviésemos la posibilidad aunque sea de comprar tres baratas [*T-shirts*], yo preferiría tener esas tres baratas para poder intercambiar. Porque por muy buena que sea esta, no podérmela quitar porque no tengo otra...” (FGA1, P5, man, middle SES, AMB).

“Si tu tens una samarreta, és molt més difícil netejar-la que si en tens dues, no? Per garantir la higiene has de tenir més d’una samarreta, no?” (FGJ2, P1, boy, middle SES, AMB).

To sum up, people agreed that a minimum number of items of a certain quality are needed to dress properly in different occasions and to ensure hygiene. In this sense, participants pointed out that this characteristic is especially important when we consider children’s clothing items, as they need to change more often as signaled in the next quotes.

“Para los niños es mejor tener recambio. Para mi aprovecho cualquier cosa, no me importa, para mis hijos sí.” (FGA2, P2, woman, low SES, Bcn).

“Porqué yo sí que, o creo es que en verano se cambian más a menudo, ¿no? Porqué se cambian más, porqué se hacen más actividades al aire libre. La sensación es que en invierno un pantalón si no está sucio pues el día siguiente igual se aprovecha, ¿no?” (FGA2, P5, woman, middle-high SES, Bcn).

This element was taken into account when elaborating the list of items for children. Regarding teens, participants also agreed that it is more difficult to standardize their clothing list as they have their own criteria and interests in this matter, as understood in the following citations:

“Invertir cuando son pequeños es bastante tontería, yo prefiero reciclar. Tener algo para arreglar el fin de semana y ya está. Pero, claro, la otra chica de 14 años ya es mayor y ella sí que es más complicada, necesita otro tipo de armario.” (FGA2, P3, woman, middle-high SES, Bcn).

“Bueno, has d’anar ben vestit, formal. A una *chavala* el que li interessa és o lligar en aquell moment, o passar-s’ho bé, però també interessa, pues, anar guapa.” (FGJ1, P4, boy, middle-high SES, ZDP).

For this reason and, for constructing the girls clothing basket, some adulthood criteria were taken into account as explained in the next section. In the following paragraphs the specific clothing items selected and agreed in the focus groups are described.

### **The number of items of clothing**

In order to elaborate the clothing basket we started from the common criteria cross-country agreed on the ImPRovE project and adapted the list of items according to the Mediterranean weather conditions explained above, expert advice and arguments obtained from focus group discussions in our country.

As no guidelines were available in Catalonia, the expert advice was of great importance to establish the minimum number of clothing items for the different family members. For this reason we interviewed social workers, socio-educative professionals and nuns involved in charity organizations with the purpose to explore if they had theoretical or practical references to deal with this question. Some of them had started to create internal guidelines based mainly on common sense criteria: the need to guarantee a high level of hygiene, a meticulous process when washing clothes, a limited place for storage, combined with the fact that people need clothes suitable for different occasions and activities. These were the main reasons why some social organizations had begun to establish the minimum amount of items of clothing, shoes and accessories needed per person to meet these requirements.

Although these organizations take care of people in a particular social situation different from the one studied in this research (man and women between 35-45 years old; 6-11 years old boy and 12-17 years old girl, who live in households, in good health), a clothing budget is needed in these contexts for the same reasons: to protect

against weather conditions and to build the self. This is why their practical considerations were useful information to make the necessary adjustments in the list of clothing items. For example in these services it was common to provide at least three or four changes of clothes/per season, as well as the same amount for underwear according to the fact that the laundry was done two or three times per week. Conversely, in the study the number of items of clothing responds to the premise that there are ten days between wear and re-wear. For children it was fixed at least seven clothes changes in autumn-winter season and ten for spring/summer seasons. In this case this amount was considered appropriate for our study as well.

Finally, the clothing basket reflects the minimum number of items for both working and non-working people. The main reason is that there is a wide variability of jobs. Because of this heterogeneity, it is difficult to standardize the type and number of items needed in case of specific professions. Moreover, we believe that the list covers already the minimum clothing required to participate in society, to be protected from the weather and make a sense of self. All these characteristics are needed in both social conditions.

### *Coats*

Three coats were assigned for man and woman: a heavy coat for winter, a rain jacket with zipper and hood for all seasons and a sport vest. The different coats should be suitable for formal or informal occasions. The variety of clothes is ensured because rain jacket and sport vest can be used during mid-season period as being lightweight jackets. The amount of winter coats is doubled for children to assure replacement when washed. For the mid-season one rain jacket and one lightweight jacket were also provided for children.

Additionally, a fluorescent vest is included considering the premise that families take the bicycle or the car, which is established as a security item in Spain (Comisión Europea, 2014). The Spanish General Traffic Office (Dirección General de Tráfico - DGT) recommends to pedestrians to use reflective clothes when walking in roads for safety reasons to make sure one is visible to vehicles. This recommendation is particularly emphasized during holiday periods (Dirección General de Tráfico, 2014).

### *Trousers, Dresses and Skirts*

Light and heavy variants of trousers are included for different seasons, as well as for formal and informal occasions. In order to guarantee variety of choice more than two pieces of trousers/dresses or skirts are available per person and season. For all profiles five summer trousers and Bermuda shorts are taken into account for summer. Moreover, two and three light dresses are foreseen respectively for women and girls and three skirts. For winter three heavy trousers and one velvet trouser are included for man. Regarding women and girls one velvet trouser is included, plus two winter dresses and skirts, and for boys in primary school five trousers.

### *Tops: shirts & T-shirts*

Long and short shirts and T-shirts were included for each person in the household. Shirts were foreseen for more formal occasions, while T-shirts for multifunctional and everyday use. As shirts are considered a light wear, they can be worn all along the year combined with T-shirt, undershirt or with a sweater in case of cold weather. Moreover, cotton or linen shirts are useful in summer, because they help perspiration. Thus, three long sleeve shirts and five short sleeve shirts were included for men and women. The children amounts were decreased to one long sleeve shirt and two short sleeve shirts, as the items are reserved for formal occasions.

Two long sleeve T-shirts and eight short sleeve T-shirts were included for men, women and girls. In the case of short sleeve T-shirts, eight T-shirts makes sure people in summer are able to change every day. Thirteen short sleeve t-shirts are included for boys to guarantee they have sufficient items in case of taking part in outdoor leisure activities organised by associations foreseen in the Safety in Childhood basket.

### *Sweaters*

For winter season three types of sweaters are taken into account depending on the occasion: a fleece sweater, a multifunctional heavy sweater and a smart heavy sweater either for men and women. The same items were included for boys and girls, but for the multifunctional heavy sweater the amount was doubled in the case of girls and multiplied by three in the case of boys in order to be able to change in case of getting dirty when playing.



As summer days are very hot, light cardigans are more suitable to protect against cold or wind if temperature decreases, particularly, at night or due to air conditioning in buildings and public transport. For this reason, a pair of cardigans was added for men, women, boys and girls. At the same time, this item could also be useful to wear on formal occasions or outdoor activities in the evenings.

### *Sportswear*

For outdoor or indoor activities in autumn-winter season a tracksuit is included for each family member. Conversely, for spring-summer time or indoor winter activities a sport T-shirt and a pair of shorts are more suitable. Also a swimsuit has been added for each person too. One extra tracksuit and an additional swimsuit for boys and girls for the weekly participation in sport activities (gymnastics at school or leisure activities) is foreseen in the Safety in childhood basket for each children because when doing sports clothes become easily dirty and it might be no time to wash and dry between activities.

### *Underwear*

Concerning underwear the following items were included: ten underpants per person to be able to change daily; four bras for women and girls; four under-shirts without sleeves for men, women and girls and six for children and a pair of summer and winter pyjamas or nightdresses for each family member.

Under-shirt is a traditional clothing item, considered really useful because it is very close to skin and protects against cold. Although the Mediterranean climate could be very mild in winter cold episodes could appear and people have to be protected. Thus, it is included to respond to this specific function.

### *Socks*

In the case of socks ten pairs of winter socks are included. This amount responds to the premise that there are ten days between wear and re-wear in order to have time to wash and dry them. In addition, in winter more time is needed to dry them as the model family do not have dryer machine. In summer, socks are not really essential according to weather conditions. Open shoes are the ones mainly worn during this season (e.g. sandals). Socks might be restricted to few occasions, for example, wearing dressing shoes in formal occasions, when it rains, or to protect feet against perspiration.

However, for spring and autumn fine socks are worn and depending on which area people go on holidays socks might be needed in summer. For this reason five pairs of summer socks are estimated for men, women, boys and girls. Finally, two pairs of sport socks were included.

Additionally, two pairs of stockings and leggings are taken into account for women and girls. This amount responds to the fact that dresses and skirts are not worn every day and in summer light dresses and light skirts could be worn without stockings according to the hot Mediterranean climate.

### *Accessories*

Regarding accessories the following ones were included for each family member: a winter cap, a summer cap, gloves, one scarf, one belt, one wallet, a backpack and a weekend suitcase.

Moreover, for women and girls handbag and a foulard to protect from cold and wind were added. A foulard is an item with a multifunctional character that can serve for formal occasions more suitable to be combined with smart clothes instead of a scarf. A tie is also included for men for formal occasions. Also an umbrella is foreseen for men, women and girls. For children it could be more practical to use their own rain coat or parents' umbrella. Finally, a folding shopping bag is added for each adult.

### *Shoes*

Podiatrists have established certain quality criteria for shoes to guarantee healthy feet. Particularly, they recommend avoiding closed toe and high heels. The heel must be between 2,5 and 4 cm and moderately used (Ferro, 2012). There are also specific guidelines to choose children shoes, which should be flexible, light, with anti-slip and flat soles, adaptable and adjustable to the shape of the feet. For example, equipped with laces and made of natural materials to permit perspiration (Pou & Pérez Quirós, 2010).

According to these recommendations to maintain a healthy feet and due to climate conditions different kinds of shoes are included for each family member. One pair of dressing shoes, winter shoes and trainers were included for adults. For summer two pairs of summer shoes (e.g. sandals) were included for man and woman as it might be more comfortable to have the possibility to change shoes due to the hot weather.

For children one pair of winter shoes, summer shoes and two pairs of trainers were included. Trainers can be worn all the year round, so they are taken into account as a summer wear. In the case of 6 to 11 year old boys an extra pair of shoes to horse around and play was added. Additionally, rubber boots to go walking or hiking when it rains were also included. For the teenagers girls also dressing shoes are added too.

Regarding slippers three kinds of slippers are foreseen for each person: one pair of winter slippers and one pair of summer slippers, both to be worn indoor at home. Finally, flip-flops mainly used to protect the feet when participating on activities in the gym, the swimming pool or the beach.

Table 27. Total number of clothing items per clothing category for woman, man, boy and girl.

Clothing basket per category	Woman	Man	Boy 6-11y	Girl 12-17y
Coats	4	4	5	5
Trousers	6	8	10	6
Dresses or skirts	9	-	-	10
Tops: shirts & T-shirts	18	18	19	13
Sweaters	5	5	7	6
Sportswear	4	4	4	4
Underwear	22	18	20	22
Socks	21	17	17	21
Accessories	12	11	8	11
Shoes	8	8	9	8
<b>Total N° Clothing Items</b>	<b>109</b>	<b>93</b>	<b>99</b>	<b>106</b>

Source: Own compilation.

The Table 27 above summarizes the total number of items per each clothing category for the different profiles. The larger number of items for women and girls is explained by the inclusion of dresses and skirts, the increased number pieces for underwear clothes (e.g. bra), as well as stockings and leggings added in the socks category. In the case of 6 to 11 year-old boys, although the total number of items is smaller than for women and girls, there are some categories for which the number of items is higher, such as for coats, trousers, tops, sweaters and shoes as it is considered that children need to change more often in case of getting dirty when playing or because of the participation in leisure activities foreseen in other baskets.

### **Suitable quality, fabric recommendations and life span of clothing**

In order to guarantee that the clothing items selected had a suitable quality it was important to know which fabrics were more adequate. As a rule natural fibres are the most convenient ones especially when considering clothes in contact with skin (CRIC, 2012a; Ajuntament de Barcelona, 2008).

Following the recommendations of the studies above, among natural fibres cotton is the most appreciated. Linen and silk are ideal for high temperatures. Artificial fibres made of cellulose, such as viscose is also cooler than cotton, but less resistant. Natural fibres (cotton, wool and linen) can gain resistance if they are mixed with a small quantity of polyester, around 20%. For example this could be useful for items that need to be washed more, such as underpants. Other natural fibres such as silk, hessian or bamboo are very resistant, although items made of these materials are usually very special. Thus, as far as possible and taking into account that the items should be machine washable, the clothing items selected were made 100% of cotton. Nevertheless, sometimes due to availability the selected clothes were mainly made of cotton, but mixed with other materials. Some of the clothes selected were also made of synthetic fibres, which allow a better resistance. This is the case for coats, sweaters, sport clothes and some accessories made of polyester or polyamide. For shoes it was also checked that the selected ones were mainly made of natural fibres to ensure perspiration and avoiding plastic, polyurethane or toxic substances.

Regarding life span, in general, children clothes are foreseen to last only for a period of one year because of the growing up, except for some items that are foreseen to last two years (e.g. coat, pyjamas, undershirts, belt, gummy boots). For men and women the average life span of items is generally between two and three years, except for clothing items and accessories that are less used and therefore last longer: from three years up to ten years, this is the case of some accessories (e.g. backpack or suitcase).

## **Maintenance, storage and repair of clothes and shoes**

Considering the maintenance and storage, there are few guidelines that establish how to keep, take care, wash and dry clothes as it is a practice culturally transmitted that depends on habits and other conditioning factors such as climate, available time and space at home or personal competencies (e.g. sewing). Some recommendations oriented to lengthen the life span of clothes have been found (CRIC, 2012b). Thus, the list of items was based mainly on the Belgian proposal and the document above and, finally, contrasted in focus groups discussions in order to check the adequacy in our context.

The Table 28 below illustrates the final items considered for the maintenance, storage and repair of clothes and shoes. For washing and drying clothes the following items were included: one washing machine, washing powder and stain remover; one iron and an ironing board, one clothes horse and clothespins and a laundry basket per each family. Regarding the storage of clothes a wardrobe and a chair for each family member was provided, plus ten hangers per person and a rack for coats per each family unit. Also some basic material for simple repair of clothes was added, which included: a pair of sewing scissors; a meter seams; a template; a tailor chalk; a tape; thimbles; a box of pins and an assortment of needles. For maintenance, storage and repair of shoes the minimum resources required were: a shoe cabinet, three boxes of shoe polish of different colours (black, brown and colourless), a shoe brush, two shoe laces for each family and the cost of changing heels and soles once a year for each family member. The life span of the items depends on their characteristics and functions. A higher life span is considered for furniture and the washing machine between fifteen and ten years, while for other products the replacement is fixed annually (e.g. products for shoes maintenance and repair) or every five years (e.g. iron and ironing board).

After the first round of focus groups discussions some products were left out as regarded as not particularly used in our context. For example, a waterproof spray was seen as a product not absolutely necessary to clean shoes. Some participants did not know what it was. About the inclusion of a sewing machine interviewers argued that the sewing culture is diminishing nowadays and that for minor repairs done at home it is not needed. At the same time, own production of clothes is not worth it because there is a wide offer of good value for money clothes, as indicated in the section Choice of shops. Finally, a dryer was not considered essential as the favourable climate conditions permit

to dry mostly outside. In general, buildings are equipped with an exterior washing line. However, clothes horse was included because clothes could be dried inside home if the weather is bad. Other items such as natural products and covers or boxes to protect clothes not used, recommended by the available guidelines (CRIC, 2012b), were not seen as necessary elements by participants in focus groups.

Table 28. Items for the maintenance, storage and repair of clothes and shoes.

Item
<b>Maintenance (clothes)</b>
Washing machine. A+, 6kg
Washing powder
Stain remover
Ironing board
Iron
Clothes horse
Clothespins
Laundry basket
<b>Storage (clothes &amp; shoes)</b>
Wardrobe
Hangers in the wardrobe
Rack for coats
Shoe Cabinet
Chair
<b>Maintenance (shoes)</b>
Black shoe polish
Brown shoe polish
Neutral shoe polish
Brushes
Laces
<b>Repair (clothes &amp; shoes)</b>
Sewing basic material
New heels and soles

Source: Own compilation.

#### **4.4. Choice of shops: clothing, maintenance & storage**

The common clothing consumption patterns are presented in this section, as well as the procedure for pricing the clothing items and the maintenance products to elaborate the clothing budget.

##### *Contextualisation of common clothing consumption patterns*

Data from a survey about Barcelona citizens' shopping habits reveals that in 2010 about fifty per cent of respondents still prefer specialized shops or neighbourhood shops to purchase clothes and shoes rather than malls or big department stores; however, this is becoming a downward trend. What is more, the results of the poll show that these preferences change with age: young people tend to go to malls and big stores and as people get older they prefer specialized shops in their neighbourhood (GESOP, 2011). As shown in the next quote this pattern was also mentioned in our focus groups:

“Sí, perquè més o menys ells ja t’ho demanen, a les cadenes aquestes. Les persones que ja som adultes comprem un altre tipus de botigues, crec. Jo en aquestes botigues doncs, pràcticament, no he comprat roba. Més en el barri mira passes per una botiga de proximitat i mires... o un magatzem que saps que allà trobaràs una oferta amplia. Però ells sí que compren més en aquestes cadenes grans tipus Bershka, H&M, Zara, Mango.” (FGA5, P6, woman, middle-high SES, Bcn).

In any case, the choice of shops is linked to preferences about quality or quantity of clothing items. As shown in the section justification of the clothing need, participants in urban areas agreed that variation is important, so they would rather buy more affordable clothes than few expensive ones. However, they also said that a minimum quality is important to have good-looking clothes for a longer time, so they would look for best value products.

The self made production of clothes is something unusual nowadays. The sewing culture is disappearing in Spain (SETEM-Campaña Ropa Limpia, 2005), although in the actual context of economic difficulties might be coming back. Focus group participants living in urban areas argued that it is impossible to produce own clothes because first, you need to have time and competences to do it. Secondly, it would not make sense because the final price would be more expensive in comparison with the direct purchase of clothing in shops, as illustrated in the following quote:

“Però a veure, jo si fes la roba aleshores vas a los ratos llibres a comprar una cremallera, un botón esto y lo que sea y te vale más que ir al H&M y comprar unos pantalones!” (FGA1, P1, woman, low SES, AMB).

However, participants agreed on a simple own maintenance at home that does not require high competences. Own personal maintenance is practiced now more because of the crisis and also as an educational value for children. For these reasons the clothing basket included some basic items for this maintenance task.

Buying second hand clothes is not a common practice in Spain (SETEM-Campaña Ropa Limpia, 2005). In the focus group discussions in urban areas some participants suggested that this practice is only restricted to certain kind of clothes, such as jackets or as a fashionable trend between young people. However, the possibility of exchanging clothes between siblings, relatives or friends is present in our society. Participants in focus groups mentioned that this is done, particularly, with babies and young children clothes, but not among teenagers. Moreover, this practice is restricted to clothes that are still usable or in good state. The next citation argues about the importance of his re-using culture and how it should be valued, particularly, for children:

“Ha habido épocas que se ha comprado ropa desmesuradamente y que no se ha aprovechado absolutamente nada, ¿no? Para los niños es un valor que se pueda aprovechar.” (FGA2, P5, woman, middle-high SES, Bcn).

However, these practices have not been taken into account because according to common criteria in the study freedom of choice might be limited, which is considered to be essential even applying a minimum budget. In addition, it is difficult to assess the general impact of these practices on our society and to estimate the saving that families could have on clothing when doing it.

The common shops repeatedly mentioned in the focus groups were H&M, Zara, Decathlon (for sport clothes and some accessories) and Ikea for maintenance and storage material. About the possibility to purchase less expensive in big supermarkets such as Carrefour or Primark they said that clothes could be of less quality and, therefore items would last less time. According to this argument the shops mentioned above were the ones used for the pricing process. These retailers are also widely spread in Barcelona and generally across urban areas in Catalonia. Focus groups from the



second round have confirmed this choice. Children and adults agreed that these shops offer good value for money, as well as promote safe guaranty policies:

“Es que hoy en día el mercadillo no te vale la pena porque a veces en el Zara sale mucho más barato que en un mercadillo [*street market*].”(FGA1, P7, woman, middle SES, AMB).

“Però vas al mercadillo a tornar-ho i no t’ho canvien. Vas al Zara i t’ho canvien. O sigui, et posen unes mínimes condicions en cas de que surti malament.” (FGJ2, P1, boy, middle SES, AMB).

“Per anar d’excursió i això al Decathlon.”(FGJ4, P3, boy, middle-high SES, AMB).

“Sovint, encara que sigui de qualitat si ets una família de cinc persones doncs, busques que sigui a meitat de preu com Decathlon.” (FGA5, P3, woman, high SES, Bcn).

#### *Pricing procedure*

The pricing process was done using shops’ website. We selected the item with the price that allowed people to choose between three different pieces and discounts or sales were not taken into account. Regarding sizes we chose the item that had a wide range of sizes available: from smaller size to largest size. We completed the pricing process during April and May 2014, except for winter clothes that were priced in October 2014. Finally, after checking prices for each item, the price was multiplied by the number of items and divided by their life span in years. The figure obtained was divided by twelve (referring to months) in order to obtain the monthly price. Finally, a 10% discount was added to the end price as people tend to buy clothes during sales periods.

Regarding storage and washing products, they were priced at the same retailers used for other baskets (e.g. mainly Mercadona for cleaning products and Ikea for storage items). We understand that buying washing products in the same supermarket chain where food is bought is reasonable for families in terms of the organization of quotidian life and time saving.

#### **4.5. Overview of the total Suitable Clothing basket**

The Suitable Clothing basket is composed of clothing items, accessories and shoes for all seasons, as well as the products needed for their maintenance, storage and repair. Figure 5 shows the total monthly budget for each family member, while Table 29 illustrates the total monthly clothing budget developed for 10 family types.

The most expensive budget is for a primary school child because of the increased number of coats, trousers, tops, sweaters and shoes. The estimated price for girls between the age of 12 and 17 is also higher than women's coats, trousers, dresses and skirts and sweaters, as the amount of items foreseen is also higher for these categories. At the same time, the consideration of a shorter life span for children's clothing items results in a higher monthly price. Although women have more clothing items, the budget between women and men is very close in all categories, except for shoes. This might explain why the total clothing budget for men is higher than for women despite having been priced in the same shops.

To sum up, and as observed in Table 30, the number of people in the household increases the clothing budget and, particularly, the presence of children. On the contrary, as some maintenance, storage and repair items are shared between family members (e.g. washing machine, iron, clothes horse) it is noticed that some economies of scale appear, meaning that the budget does not increase in proportion to the number of people in the household.

In conclusion, age is the main variable that explains the variance in the clothing budget. Participants in focus groups in densely populated areas in Catalonia have manifested a common consensus about the importance of having sufficient variety of clothes in order to be able to develop the different social positions and the associated activities, especially, for children and teenagers. Although people expressed that exchanging clothes is frequent in our context the difficulties to estimate the cost of this practice make impossible to take it into account. Thus, as clothing is important for the protection against all weather conditions, as well as it is a way of expressing our identity, the basket reflects the minimum resources to satisfy this need for an adequate social participation.

Table 29. Total monthly budget per clothing category for various family types. Barcelona reference city, 2014.

Clothing per category	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Coats	2,03	2,65	5,68	6,30	6,66	7,29	4,68	8,33	9,32	12,96
Trousers and dresses or skirts	6,54	6,71	17,84	18,01	16,07	16,24	13,26	24,55	22,78	34,08
Tops : shirts&T-shirts	6,72	6,73	17,68	17,69	14,80	14,80	13,45	24,41	21,52	32,48
Sweaters	1,56	2,18	8,20	8,83	6,27	6,90	3,74	10,39	8,45	15,10
Sportswear	2,13	1,31	3,58	2,76	4,44	3,62	3,43	4,89	5,74	7,20
Underwear	5,86	5,58	11,41	11,13	10,58	10,29	11,44	16,99	16,15	21,70
Socks	1,72	1,05	4,04	3,37	4,38	3,71	2,76	5,08	5,42	7,74
Accessories	2,31	1,71	4,35	3,75	5,27	4,67	4,02	6,06	6,98	9,02
Shoes	9,63	14,87	20,74	25,98	19,05	24,29	24,50	35,61	33,92	45,04
<b>Total budget (€) / month</b>	<b>38,49</b>	<b>42,79</b>	<b>93,52</b>	<b>97,82</b>	<b>87,51</b>	<b>91,81</b>	<b>81,28</b>	<b>136,31</b>	<b>130,30</b>	<b>185,33</b>

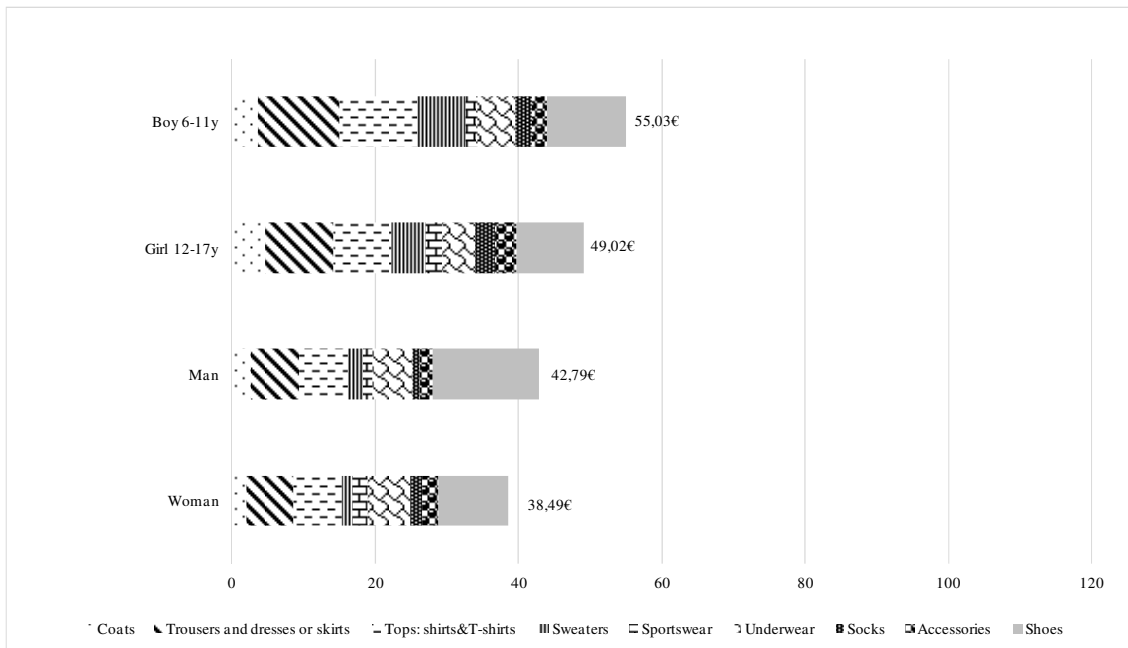
Source: Own compilation. Note: the total price per month in Euros of each clothing category was reduced by a 10%.

Table 30. Total monthly budget for the Suitable Clothing basket for various family types. Barcelona reference city, 2014.

Suitable Clothing basket	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Clothing items	38,49	42,79	93,52	97,82	87,51	91,81	81,28	136,31	130,30	185,33
Maintenance, storage and repair	7,45	7,45	9,71	9,71	9,71	9,71	9,71	11,34	11,34	13,49
Washing	1,30	1,30	1,74	1,74	1,30	1,30	1,30	2,02	1,58	2,31
<b>Total budget (€) / month</b>	<b>47,23</b>	<b>51,53</b>	<b>104,97</b>	<b>109,27</b>	<b>98,52</b>	<b>102,81</b>	<b>92,29</b>	<b>149,68</b>	<b>143,22</b>	<b>201,13</b>

Source: Own compilation.

Figure 5. Total monthly budget per clothing category. Woman, man, boy and girl. Barcelona reference city, 2014.



Source: Own compilation. Note: the total price per month in Euros of each clothing category was reduced by a 10%.

## **5. The Rest and Leisure baskets**

### **5.1. Specific methodology**

The Rest and Leisure baskets contain the necessary items to have an adequate physical, social and emotional health in order to participate in the society (Goedemé *et al.*, 2015a). Due to the lack of national guidelines with regard to rest conditions and leisure activities, in the ImPRovE project the countries agreed on common criteria based on the Belgian proposal, regarding the type and number of items included in both baskets.

In order to elaborate the Rest basket, we used the expertise of a physiotherapist, in the absence of concrete recommendations in our country. Our expert considered that the common criteria were suitable for Spain. Mainly, the basket is composed by adequate beds and accessories for the different members of the household. Regarding the pricing we selected the less expensive option and used multinational retailers widespread across the country, with delivery and warranty services and online shopping in order to facilitate cross-country comparability.

In the case of leisure we sustained the adaptation to the local context by means of scientific literature, survey data and important feedback from the focus groups. Three main sources of leisure were recognized in the six countries: holidays, domestic leisure, participation in social and cultural activities (Goedemé *et al.*, 2015a). Concerning the pricing procedure we relied also on the same retailers used in the rest basket or other baskets, as well as survey data for pricing the specific activities.

Finally, throughout the analysis of the discussions of the focus groups in densely populated areas in Catalonia, we reach the consensus between adults and children around these needs, as well as possible determinants for the inclusion of rest and leisure goods and services.

## 5.2. Content and overview of the total Rest basket

The rest basket contains the equipment for a proper sleeping and accessories. The number of items was decided taking into account hygiene standards and practical considerations. For example, two sets of bed linen and quilt cover are provided for each bed to be able to wash and dry the bed clothes once a week. The number of beds and furniture is determined according to the number of people in the household. It is composed by the following categories:

- A combination of a bed frame, a slatted base and a mattress (35 kg / m<sup>3</sup> and minimum thickness of 12cm) in the form of single beds for children older than two years old and double beds for adults.
- A four season duvet, along with pillows and mattress protector for every person.
- A simple folding bed in case of inviting family or friends for sleepover in order to accomplish the social positions each family member should be able to develop.
- Other accessories: alarm clock, battery, table lamp and bedside table per person aged over 6.

The quality and life span of each item respond to the common criteria agreed between countries and based on the previous Belgian proposal. The estimated time for replacement of beds according to the quality of the items chosen is 10 years, while the foldout sofa is 20 years as it is not used every day. For the other items that compose the basket the replacement time is estimated between 2 and 5 years.

In order to obtain the price per month, the price is multiplied by the number of items and divided by their life span in months. As shown in Figure 6 the monthly price for the rest category corresponds to the smallest amount for each family type. The budget for singles and couples is very similar due to the fact that a double bed is included also for single persons; the difference between both budgets is produced by the number of accessories for couples, which is doubled. The number of accessories needed is also the reason why the budget increases as the family grows. The highest budget in our study is for couples with two children, which includes single beds for each child and accessories for each family member.

### 5.3. Justification and common consensus on the Rest basket

The rest basket was discussed in four focus groups representing the three areas studied Barcelona, AMB and other densely populated areas. The need to rest is essential for an adequate physical, social and emotional health, as expressed in the following quotes by both children and adults:

“P8: Tu no pots rendir a la feina si no tens descans, no pots relacionar-te bé si no tens descans.” (FGJ2, P8, boy, high SES, AMB)

“P2: És com un pacte que fas amb la teva pròpia salut, no també...? Tu necessites parar de tan en tan.” (FGJ2, P2, boy, middle-high SES, AMB)

“P5: Yo añadiría poner el descanso, porque tengo la sensación de que la agenda de los niños es muy intensiva [...] Entonces a veces nos olvidamos de que es tan importante el tiempo de juego, de ocio como el tiempo de descanso.” (FGA6, P4, man, high SES, AMB)

In the last quote the participant manifested how sometimes the time to rest is threatened by the rhythm of our society and the multiple activities often assigned to children. For these reason it is necessary to provide time, space and adequate accessories to fully satisfy this need. Among the appropriate equipment to rest interviewers specified the elements to be included in the basket, such as a place to sleep equipped with a bed and bed clothes:

“M: Què necessitaríem per poder descansar? P4: Doncs, un llit, un lloc on dormir..., un lloc on no tindre fred. P1: Com tapar-te...” (FGJ1, P4, boy, middle-high SES; P1, boy, middle-low SES, ZDP)

The rest basket presented here provides at a minimum some of the elements to develop this need. Participants in the focus groups in densely populated areas agreed on the resources proposed. No other conditions were highlighted, except that being able to rest is important and, therefore appropriate space and bedrooms in an adequate house should be taken into account. The criteria for an adequate dwelling according to the composition of the household are developed in the section housing costs.

#### **5.4. Justification, content and common consensus on the Leisure basket**

The leisure basket is composed of three main categories of leisure: holidays, domestic leisure and participation in socio-cultural activities. In the next paragraphs, it is described the specific composition of each category sustained in literature and the data available during the development of the ImPRovE project (2012-2014), as well as the focus groups discussions. The second round of focus groups with children and adults has confirmed the consensus among these categories and pointed out some factors that might influence the content: the working status and age.

##### **Holidays**

Concerning holidays, more than six out of ten Spaniards spent at least one night away from home when travelling on business or pleasure purposes in 2012 (64%) according to the *Flash Eurobarometer Report No.370* (European Commission 2013c:50). This rate is 7 points below the average of the European Union (71%). The majority of participants in focus groups considered that a five-day domestic holiday trip in summer is required for an acceptable living standard. However, children's summer vacation lasts two and a half months in Spain (from mid June to mid September). In addition, the school calendar includes two weeks of holiday at Christmas and approximately ten additional days at Easter term. For these reasons, other opportunities along the academic year to go on day trips were included in the Safety in Childhood basket. However, the difficulty to match the school terms with parents' holiday was a focus of the debate in adult focus groups. Parents can adapt to the school calendar and plan family holidays, but it depends on their professional sector, as expressed in the following quote:

“P4: Jo per exemple, tinc les vacances al juliol o a vegades el Nadal o èpoques així que encara treballes i els educadors encara tenim cert marge. Però els treballadors en general si que necessiten cobrir aquests espais en què els nens tenen vacances i els grans no.” (FGA4, P4, man, middle-high SES, ZDP)

In order to deal with this issue some parents expressed the need to rely on relatives or specific activities for children to reach work-life balance, which will be taken into account in the Safety in Childhood basket.



The holiday budget is composed of a four nights stay in a hotel, food on vacation (15% of the food basket and one warm meal in a bistro) and pocket money (2€/per person) to spend as one pleases. In the focus groups discussions, the camping option was seen as an expensive one, also because it requires a car. Another feasible option for the participants was to spend holidays at friends' or relatives' place. In fact, 39,8% of the domestic tourism trips respond to this type of accommodation option (Instituto de Estudios Turísticos, 2012). Although this option is the most common one, in order to guarantee cross-country comparability between the budgets, we agreed on including a vacation less dependent on relatives and friends in order to give more freedom to families. Consequently, taking into account that 17,8% of Spaniards take the Hotel as an option for domestic tourism trips according to the same source, we included this type of accommodation in the leisure budget. We used the report *The Hotel Price Index. Revisión de los precios hoteleros globales: Enero-Junio 2011* to estimate the price for the stay at the Hotel. According to this analysis Spaniards spent on average 76€ per night/bedroom in Spain (Hoteles.com, 2011:26-27). This price was multiplied by four because of four nights away and divided by the 12 month life span, as the holiday is foreseen once a year. For families with secondary school children two bedrooms were provided, one for parents (single or couples) and another bedroom for the child/children.

The conversation with teenagers and adults in densely populated areas has confirmed the importance of including a budget for a family holiday. Participants agreed that holiday time is needed to rest, unwind from work, obligations and daily routines, as well as a way of stimulating cultural activities through discovering new places. In that sense, they proposed feasible options within the territory such as going to other villages, the beach or the countryside by means of public transport or car. The travel costs for holiday journey are included in the mobility basket.

“P2: Anar a la muntanya, anar a la platja, fer activitats de família juntes...P1: El que estaria clar és que seria sortir una mica del context que és habitual. Més o més a prop, no?” (FGA5, P1 & P2, women, middle-high SES, Bcn)

“P1: Agafar un cotxe seu i es va de Sabadell a Tarragona per exemple...No cal anar-se molt lluny per passar-s'ho bé.” (FGJ1, P1, boy, middle-low SES, ZDP)

## **Domestic leisure**

Regarding the domestic leisure the items included were mainly electronic devices TV set, DVD and their corresponding accessories (support to fix the TV in the wall and cable HDMI) are included. TV and Radio are the most common media equipment; more than nine out of ten people in Catalonia have both. Nowadays, DVD players are also present in more than eight out of ten households according to the *Encuesta de Hábitos y Prácticas Culturales en España 2010-11* (MECD, 2012). In the case of the radio, participants in focus groups agreed that there is no need for this piece of equipment anymore because radio programmes are available through on the TV, the mobile phone or through Internet connection in the computer. A small budget for snacks was also included in this category (e.g. chips).

The particularity of the province of Barcelona is the free access to the Network of Municipal Libraries. This network enables people to use all the library services (e.g. borrow books, CDs, DVDs, consult magazines, newspapers, etc). The library card is also valid to access other public libraries in Catalonia and get discounts for some cultural events as well. For this reason and the wide range of activities and services offered by libraries in our context, we did not include any additional cost for this service in the budget.

The access to the above mentioned media was considered important by the participants in focus groups in densely populated areas in Catalonia. Both teenagers and adults believed that these media are essential in order to be informed. However, the use of media might differ between children and adults. Teenagers manifested that new generations might access TV through Internet, while adults might still use the traditional TV set. Despite this difference by age regarding the use of the media no changes are applied in the basket, as the Internet connection is added to the Maintaining Significant Social Relationships basket.

## **Participation in leisure activities**

Catalonia has a wide network of associations, particularly, in the field of leisure and culture, whose origins were set in the 19<sup>th</sup> century (Ferrer Frigola, 2009). However, from 2006 to 2011 the percentage of people who belong at least to one association has decreased in Catalonia from 46% to 38% according to ECVHP 2011 (Idescat & IERMB, 2012a; 2012b). The drop has been even more remarkable in the city of

Barcelona, from 51% to 32%, though it could be linked to the economic crisis. In addition, focus groups said there are a lot of free of charge outdoor activities where people could participate without taking part of an association. Another point is the problem to find an average cost for the participation because of such a variety of associations. Therefore, the spending for taking part in social and cultural activities was based on the Belgian references, 28€ adult/per year to be spend as one pleases was included (Goedemé *et al.*, 2015a).

Additionally, we assigned a sum of money that allows adults to go out twelve times a year (once a month), which includes attending six cultural events. We estimated 7€ per each night out. Regarding the cultural events, focus groups argued that people should have the opportunity to experience a variety of cultural events:

“P5: Entonces hay muchas experiencias que son necesarias, ¿no? Por lo tanto yo creo que lo importante para la familia es que puedan hacer cosas diferentes, o sea, cosas muy diferentes, es decir, ir un día a la playa, ir un día a un museo o ir al cine.” (FGA2, P5, woman, middle-high SES, Bcn).

Based on these arguments, we provided budget to go to the cinema (2 times per year) and other cultural activities (2 theatre plays and 2 concerts per year). It is difficult to calculate the average price because uniformed prices for these events do not exist in the country or the city of reference. However, the purpose was to provide a budget that permits adults to meet their cultural needs. Thus, we estimated 7 € for each cinema ticket and as other cultural events are in general more expensive, so we doubled the price: we estimated 14 € for each concert or theatre ticket<sup>37</sup>. Teenagers also this need for adults.

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<sup>37</sup> Prices for cultural events vary all across the country, between cities and also inside cities, depending on multiple factors (the enterprise that offers the service, the type of event, the day of the week, special session discounts). There are few references about average price of these cultural services. In addition, the cultural tickets (including cinema, theatre) suffered from a VAT increase in 2013. Due to this reform, it is estimated that a ticket to go to the cinema costs on average 7,3 € and 30 € the average price to attend a theatre play according to information published in the Catalan newspaper *Ara* (14/07/2012).

For these special nights out a babysitter is needed only for a child/children between 6 and 10 years of age. We included the service only for 6 nights/year; the other 6 nights parents could rely on friends or relatives. For example, we do not count babysitter for the couple with two children, because the older child (girl 14 years old) could take care of her sibling. As expressed in focus groups adults and older children within the family could develop the function of caregivers. The next quote argues about this need:

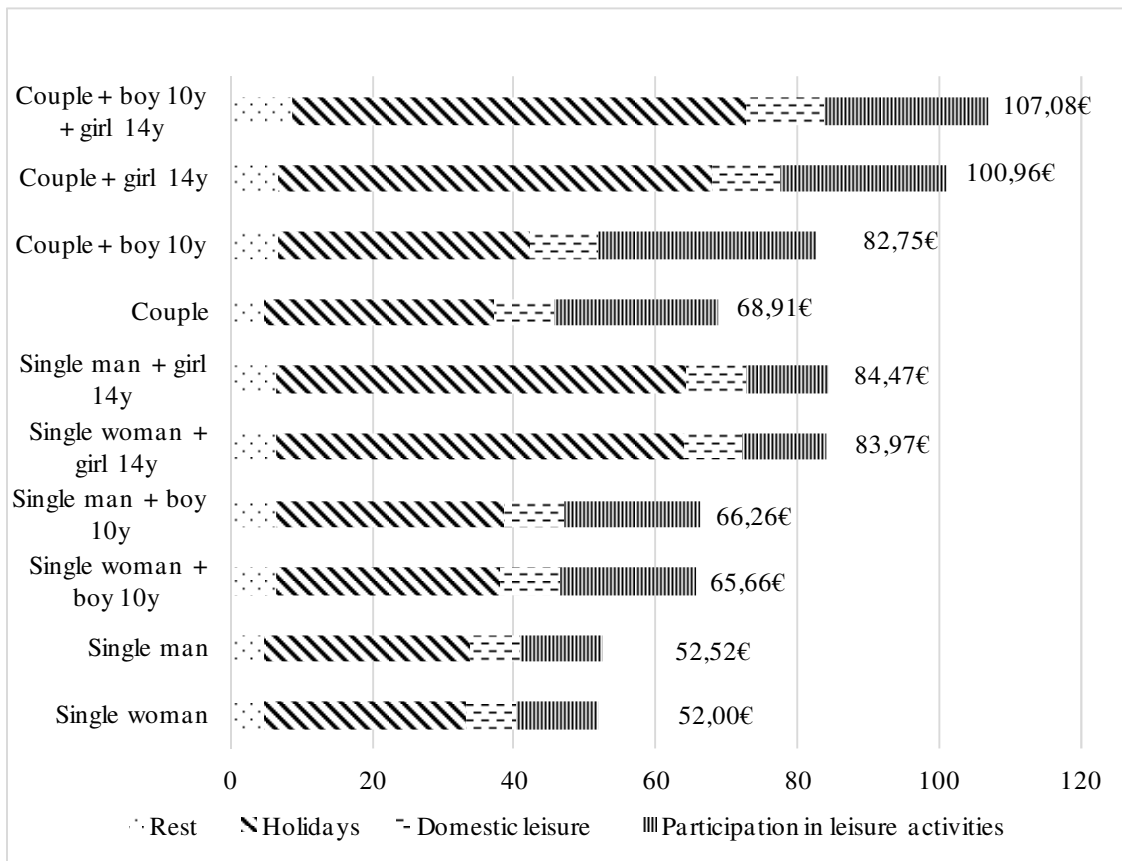
“No solo pá los niños. Tú aunque seas madre no dejas de ser persona. Si un fin de semana están con los abuelos [los niños] pues tú te puedes quedar en casa o salir e irte a tomar una cerveza, no pá gastarte 100 Euros, vamos, ni 20, pero una cerveza 2 Euros. Te distraes un ratito y ya está [...] es necesario un espacio propio, o con tu pareja, porque no todo se centra en tus hijos, acabarías loca.” (FGA3, P1, woman, low SES, Bcn)

### **5.5. Overview of the total Leisure basket**

Figure 6 illustrates the final composition of the leisure basket. The holiday category is the one that requires more budget, especially for families with secondary school children due to the accommodation option, as mentioned before, and the higher price for food (e.g. for a snack in bistro the price foreseen for a 14 year old girl is the same as for an adult). The domestic leisure budget is similar across the various family types. Small increase is due to the number of snacks during leisure time according to the number of people in the household. Finally, the amount foreseen for participation in socio-cultural activities increases in proportion with the number of adults in the household.

The basket foresees the minimum amount of resources needed to satisfy the leisure need. Focus groups from the second round have confirmed that a social consensus exist on these categories in densely populated areas in Catalonia. However, parents working status appears as one of the determinants for planning holidays and differences in age also influence the uses of the media equipment provided for the domestic leisure.

Figure 6. Total monthly budget for the Rest and Leisure baskets for various family types. Barcelona reference city, 2014.



Source: Own compilation.

## **6. The Personal Care basket**

### **6.1. Specific methodology**

The Personal Care basket includes the minimum necessary items in order to have an adequate personal hygiene, which is important to prevent disease, as well as to promote psychological and social inclusion. In the first step, in order to build the country-specific Personal Care basket, we validated the Belgian list of goods and services, which was developed in previous projects (Diepstraten, 2009), by a national health expert, who considered the list suitable for our local context (Goedemé *et al.*, 2015a).

In the second step, the acceptability of the list was contrasted during discussions with three focus groups to check whether the composition was culturally acceptable. Participants also informed us about purchasing patterns regarding these goods and services. When possible, we used prices from the same stores as in the food basket, as agreed in the focus groups discussions.

Finally, in order to check the validity of the basket in densely populated areas in Catalonia, focus groups from the second round with adults and children tried to reach common consensus on the justification of the need and acceptance of items. Moreover, they pointed out possible determinants for the inclusion of these goods and services.

### **6.2. Justification of the Personal care need**

People living in densely populated areas in Catalonia understood that the need for personal care was essential not only to guarantee personal hygiene, but also for an adequate social participation in our society, meaning that people are able to develop their various social positions.

Regarding the maintenance of personal hygiene participants agreed on essential products and services to be included in the basket such as soaps, toothbrushes, cosmetics, shaving products or hairdresser. As signalled in the next quote the use of these products are necessary to look neat and tidy:

“Yo he tenido que aprender a cortarme el pelo a mí misma, a depilarme, a hacerme limpiezas faciales, todas aquellas cosas que se supone que vas a hacerte, a hacerlo yo en casa, para poder ir aseada. Porque ya no es una cuestión de ir más o menos mona, sino que es una cuestión de limpieza, de higiene.” (FGA3, P1, woman, low SES, Bcn).

“Doncs, higiene personal seria, pues, jo que sé, sabons per dutxar-se, raspall de dents, coses materials t’estic dient.” (FGJ1, P4, boy, middle-high SES, ZDP).

Moreover, hygiene is not only important for personal reasons e.g. to live healthy, but it is seen as a condition for people to be included in our society. For example in order to interact with other people or while working, as expressed in the following quotes:

“Segons en la societat en la que t’hagis criat, la higiene és un símbol de respecte cap a les altres persones. M: Val. Esteu tots d’acord amb això? Varis: Sí.” (FGJ2, P2, boy, middle-high SES, AMB).

“Sí clar, cuidar la imatge, si tens una entrevista de feina, que no vagis allà fent tota la *peste*.” (FGJ3, P7, girl, middle-high SES, Bcn).

Consequently, the composition of the basket should respond to both purposes: allow people to feel neat and tidy for hygienic reasons and provide people with self-esteem in order to develop their social positions. Age and sex were the main variables identified by participants, which influenced the composition of the basket, as the next section will show.

### **6.3. Content: common consensus on goods and services**

The basket is composed of the following categories of products: hand, body and mouth hygiene, perfume and cosmetics, intimate hygiene, shaving, hair care, as well as other accessories for the toilet and the bathroom. The specific items included in each of these categories are described in the following paragraphs.

#### **Hand and body hygiene**

According to international guidelines hand and body hygiene are essential to prevent infections and diseases caused by bacteria (Curtis & Cairncross, 2003). Thus, following these criteria and based on the Belgian proposal (Diepstraten, 2009) validated by a national health expert we included for hand hygiene: an amount of 75ml per person of neutral soap per month; nail brushes and one nail set was added for each family.

Regarding body hygiene the following products were taken into account: 25 ml of shampoo to wash the hair at least three times per week (around 2ml per wash); 125 ml of neutral soap were considered per person per month and 750 ml of body lotion per person per year. Additionally, three large bath towels and three hand towels with a life

span of five years for individual use were included per person. Although deodorant is not essential for a good hygiene, focus groups agreed to include this item to ensure a good body smell on different occasions, especially when doing activities foreseen in other baskets that cause perspiration (e.g. sports). So, at least three deodorant sticks per year for each adult. Finally, some tissues per person were included as being more adequate to prevent dispersion of bacteria.

### **Mouth hygiene**

Concerning the items for a daily and adequate oral health the list of products included was based on the Belgian proposal build using international guidelines (Petersen, 2003; Diepstraten, 2009). The list was validated in our context by a national health expert that determined that all products were suitable, which included: four toothbrushes per year and 15 ml of toothpaste per person. These products were specific for children. Other items to complete a good oral health were 200 ml of mouth wash and 1,6m of floss per person per month and one toothpick per person per day. Finally, a mug for toothbrushes was added for each family in all the countries.

### **Perfume and cosmetics**

A minimum budget of 20 Euros per year for perfumes and cosmetics was included. Perfumes were only taken into account for adults and cosmetics for each woman and girl. Participants in focus groups discussions agreed that these items could be important in order to have tidy appearance for some occasions, for example when going to a party or job interview. At the same time and, especially for women and teenage girls, cosmetics and make-up are seen as elements to promote a higher self-esteem, as shown in the following quotes:

“P1: I colònies i tot això també. [...] Per quan surts de festa o alguna cosa, pues, a lo millor...M: Val, podria ser que ho tinguéssim en compte..., no? Per què? P1: Perquè dóna bona aparença o per anar a una cita de treball...” (FGJ1, P1, boy, middle-low SES, ZDP).

“P1: A ver el maquillaje necesario no es, pero ayuda, a ésta mujer sí, [*mujer familia modelo*]. Es el único capricho que tenemos nosotras, te hace sentir bien. Todo lo que sea pá sentirse mejor o bien, es necesario. Para cada una será diferente; dile tomar una cervecilla, cuando sales de trabajar, dile maquillaje. [...]. P7: Lo importante es que esa



persona diga, yo me siento más guapa maquillada, yo me siento más mujer maquillada, pues, si se siente bien...” (FGA3, P1 & P7, women, low SES, Bcn).

Finally, complementary elements included in this category were cotton pads for each woman and girl per year and a make-up mirror per each family. In this case, the items in the category are not justified by healthy reasons, their function is to ensure that people are able to develop their various social positions and consequently become socially accepted.

### **Intimate hygiene for women**

In the case of intimate hygiene a sufficient amount of sanitary napkins and tampons per month for a five days of menstruation period are provided for women and girls aged over 12 years old following the international guidelines (McKinley Health Center, 2005). Although both items have the same function, in this way women’s choice is guaranteed, as well as regular replacement to prevent infections (Dexeus, 2016a).

### **Shaving**

Shaving is considered for each man over 12 years old, following the Belgian health expert proposal (Diepstraten, 2009). Thus, 200 ml of shaving foam to be spent in three months and a razor with replaceable blades (2 blades per month) are the elements foreseen. A shaver and one replaceable blade every two months are also provided for each woman over 12. Although our national health expert recommended waxing as a hair removal method more suitable for females, in this case the price criterion prevailed over the cultural preference to facilitate the comparison with other ImPRovE countries results.

### **Hair care**

Participants in focus groups agreed on taking into account going to the hairdresser at least every two or three months a year. As shown in the quotes they argued that this service is generally more expensive for women. Thus, they suggested going only four times per year (every three months) in the case of women, while for children and the adults men would be six times a year (every two months).

“P6: ¡Y no es lo mismo un corte de pelo de un hombre que el de una mujer! P7: El de un hombre que va a la peluquería es de diez Euros. En cambio, el de la mujer...P1: Sí, sí. P4: Exacto.” (FGA3, P6, P7, P1, P4, women, low SES, Bcn).

Rarely discounts are taken into account for teenagers in Spain. Due to this fact, the teenager girl haircut was priced as an adult woman. For women, as the frequency of going to the hairdresser was smaller, participants also agreed to include some resources for hair dyeing at home:

“Les dones totes ens tenyim el cabell per necessitat. Tu facis tu o el perruquer. [...] No es lo mismo un corte de niño que son 5 Euros que una permanente de una chica joven, quizá encontrar un término medio, ¿no?” (FGA1, P3, woman, low SES, AMB).

Other specific items for hair care agreed in all ImPRovE countries were: a comb and a hairbrush for each children and one to share between adults; one hair-dryer per each family and hairpins and hair-ribbons for women and girls.

### **Other accessories**

Finally, toilet paper, a toilet rubbish bin, a bathroom mat, a shower curtain and a toiletry bag for each adult and each child were added in response to the arguments in the focus groups as well as for comparability reasons with the rest of the countries.

### **6.4. Purchasing patterns and pricing procedure**

Participants in focus groups mentioned that these products could be bought either in the pharmacy or in the supermarket. However, they considered the latest offered a wider choice and a better price for personal care products. Thus, supermarkets guarantee accessibility to commonly used personal care products. At the same time, they argued it is reasonable for families to buy these products in the same shops as food products because it facilitates family organization. So, buying personal care products in pharmacies will be reserved for medicines or exclusively in case of very specific treatments for personal care.

The pricing process was done through websites of shops in April 2014. Once the price was checked for each product, it was multiplied by the number of products needed per year or per month and divided by their life span.

## 6.5. Overview of the total Personal Care basket

The Personal Care basket contains the minimum resources needed for a personal hygiene to prevent diseases, as well as to enable people to be psychologically healthy to develop their various social positions and be included in the society. In that sense, participants in focus groups discussions in densely populated areas in Catalonia agreed that ensuring hygiene and personal care practices is not only something important to feel good with yourself, but also for the interaction with other people. At the same time, they pointed out some differences on the composition of the Personal Care basket depending on age and sex that we have taken into account to compile the Personal Care basket for the ten family types.

As it can be observed in Table 31 and Figure 7 the total budget oscillates around 20 Euros per month for single people and 70 Euros per month for couples with two children. It is clear how the number of people in the household increases progressively the budget, which is particularly true for the following categories: hand hygiene, mouth hygiene, body hygiene, toilet and bathroom. However, the presence of women and girls in the household type makes the budget higher because of cosmetics, intimate hygiene and hair care categories. These differences could be appreciated when comparing the budget for a single woman and single man. While the budget is similar for all the personal care categories, the monthly price is higher for woman in the latest categories because of the amount of items included or its price (e.g. hair care). Conversely, man's budget for shaving is reasonably higher due to the frequency for the replacement of shaving blades. Thus, budget differences between single parent households are caused by the different sex of the main adult and the different age and sex of the child. For this reason the budget for single woman or man with a girl of 14 years old is very close to the budget for couples, around 40 Euros per month.

To sum up, the Personal Care budget depends on the members of the household, as well as on their age and sex. These are the variables that explain the most part of the variability between the family types. The fact that the majority of items are nowadays available at an affordable price in supermarkets guarantees accessibility to a wide variety of products and white-label brands that are economical. Nevertheless, consumer organizations have alerted that some personal care items, such as women intimate hygiene products, have a value added tax (VAT) of the 10% very high compared to the

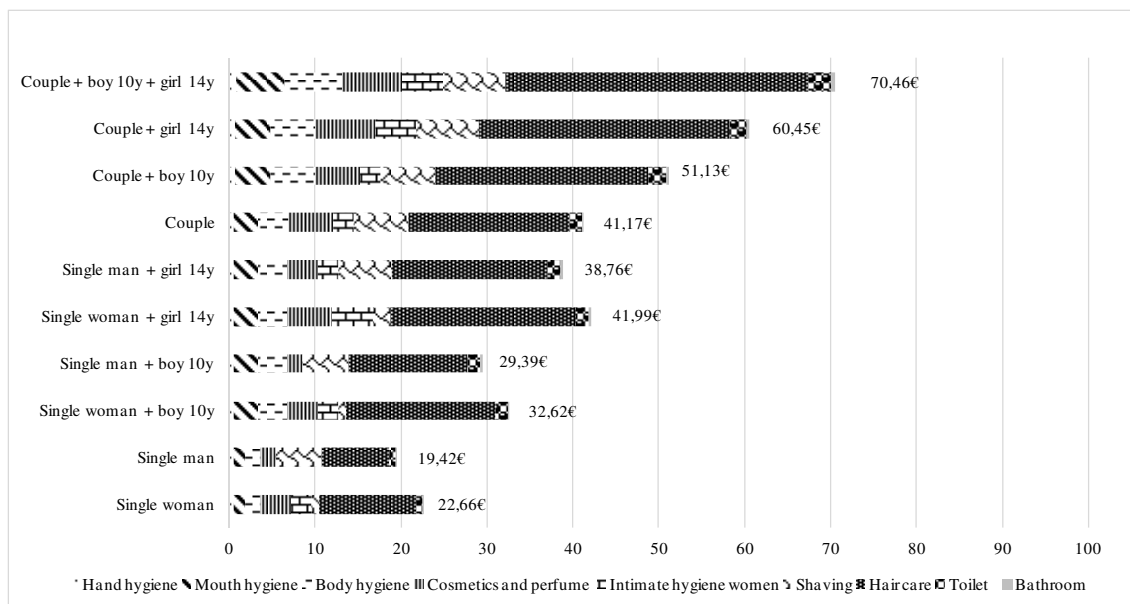
4% of other essential products like medicines (FACUA, 2015). This policy increases the final price of these products. Focus groups participants also pointed out that having a haircut is also more expensive for women. Thus, the Personal Care budget considers these differences and could be provide guidelines for policy making.

Table 31. Total monthly budget per personal care category for various family types. Barcelona reference city, 2014.

Personal care basket per category	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Hand hygiene	0,38	0,38	0,52	0,52	0,52	0,52	0,52	0,65	0,65	0,79
Mouth hygiene	1,39	1,39	2,80	2,80	2,80	2,80	2,77	4,18	4,18	5,58
Body hygiene	1,81	1,81	3,38	3,38	3,38	3,38	3,62	5,19	5,19	6,77
Cosmetics and perfume	3,50	1,78	3,50	1,78	5,22	3,50	5,16	5,16	6,88	6,88
Intimate hygiene women	2,37	0,00	2,37	0,00	4,75	2,37	2,37	2,37	4,75	4,75
Shaving	1,00	5,30	1,00	5,30	1,99	6,30	6,30	6,30	7,30	7,30
Hair care	11,30	7,85	17,35	13,90	21,64	18,19	18,80	24,85	29,14	35,19
Toilet	0,75	0,75	1,42	1,42	1,42	1,42	1,42	2,08	2,08	2,75
Bathroom	0,16	0,16	0,28	0,28	0,28	0,28	0,21	0,33	0,28	0,46
<b>Total budget (€) / month</b>	<b>22,66</b>	<b>19,42</b>	<b>32,62</b>	<b>29,39</b>	<b>41,99</b>	<b>38,76</b>	<b>41,17</b>	<b>51,13</b>	<b>60,45</b>	<b>70,46</b>

Source: Own compilation.

Figure 7. Total monthly budget per personal care category for various family types. Barcelona reference city, 2014.



Source: Own compilation.

## **7. The Health Care basket**

### **7.1. Specific methodology**

The Health Care basket includes the minimum necessary resources to maintain good health for an adequate social participation. The budget was constructed using the common principles stated in the ImPRovE project. Firstly, the costs were estimated assuming that all the members in the reference family are in good health, live in healthy socioeconomic environment and are well-informed about the medical facilities and their use. A change in these circumstances will make the calculation of these costs difficult, as for example more resources will be needed for people suffering chronic diseases. Secondly, the health care basket is composed of goods and services related to disease prevention, injuries, contraception and non-severe everyday diseases (Goedemé *et al.*, 2015a).

In order to construct the budget, we also started from the Belgian health care basket, which was adapted to our particular institutional context and validated by the same health expert that participated in the validation of the Personal Care basket. Additionally, two rounds of focus groups discussions were held to find out the justification and acceptability of the items included for densely populated areas in Catalonia, as well as information about the purchasing patterns for these goods and services. The items were priced in April 2014 and when products were available in the supermarket this was the option chosen, as being more economical, except for specific medicines.

This chapter is structured in three parts. In the following section a brief presentation of the main characteristics of the Catalan Public Health Care System are detailed, as it is the framework in which the Health Care budget is embedded. Afterwards, the specific content of the basket is described and, finally, an overview of the budget is given for ten different family types.

## 7.2. Organisation of the Public Health Care System

The *Spanish Constitution* (article No. 43) recognises the right to health protection and establishes that the state should organise the Public Health Care System, including the preventive measures and necessary services to guarantee this right. The organisation, functioning, evaluation and control of the Health services, centres and institutions are transferred to the autonomic governments. Thus, the Catalan Government, Generalitat de Catalunya, is the institution responsible for the decisions related to health in Catalonia through 'CatSalut', the Catalan Health Service, which is the state body that guarantees the right to health care protection for all citizens in its territory.

The Catalan Health System is universal, which means that medical attention is guaranteed, with different categories of coverage depending on the personal conditions. This level of coverage determines the level of benefits that a person receives. In any of the cases, the medical costs of the consultations and related services (such as medical tests or hospitalizations) are funded by the national taxes, so the citizens do not have extra payments when using them (Generalitat de Catalunya 2012; Spanish Ministry of Health, Social Services and Equality 2011).

Prescribed medicines have a certain rate of co-payment depending on the specific drug and the total income of the breadwinner in the household. However, certain groups are exempt from any contribution, such as individuals with a disability degree higher than a 33%, people receiving treatment for a work-related accident or disease, non-working individuals without social benefits and those receiving non-contributory pensions, although some form of co-payment related to income has been applied since 2012 (Carvalho Fortes, Ribeiro-Parizi-Carvalho & Prado-Louvison, 2015). Because of the price variability and because the reference family is assumed to be healthy and composed of adults in working age, we took the common-base price without discounts for the medicine chest from the pharmacy.



### 7.3. Justification and Acceptability of the Health Care need

Participants in the focus groups living in densely populated areas generally agreed that for any type of disease or medical treatment the Public Health Care System is used widely by all the citizens in Catalonia. Therefore, people identified ‘being patients’ or ‘users of public services’ as social positions to develop in order have an adequate social participation, as reinforced in the chapter on social positions. The following quotes illustrate this association:

“M: I com a pacients o clients? Quan heu dit això, en què estàveu pensant? P7: Jo amb la típica visita al metge. P5: A la Seguretat Social.” (FGJ4, P7 & P5, girls, middle-high and high SES, respectively, AMB).

“Si t’han de fer un tractament depèn del que sigui has d’anar a la Seguretat Social.” (FGA1, P7, woman, middle SES, AMB).

As the elaboration of the Health Care basket is based on the assumption that the members of the model family are in good health, participants agreed that medical consultations should occur occasionally for minor health problems, for example, a visit to a dermatologist. Nevertheless, sometimes families opt for an additional health insurance, to face some extra costs, for example, for dental care or pay for each visit.

“I tot i tenir bona salut, sempre has de tenir en compte *tipo* dermatòleg, que si fas piscina has de tenir en compte els fongs que si...” (FGA5, P10, woman, middle-high SES, Bcn).

“Igual que hi ha l’extra escolar hi ha l’extra salut.” (FGA5, P3, woman, high SES, Bcn).

In any case having a health insurance is not something compulsory in our country and as justified above the Public Health Care System is considered to be quite good, even more for a minimum budget. When participants were shown the list of goods and services included in the basket all the items were accepted, although they agreed that the medicine chest should be restricted to essential products to avoid expiration:

“P8: Pues mira, las tiritas. Vendaje. La pinza, las tijeras. Antiséptico. Y, si algo más me apuras la pomada para las quemaduras. P7: Y yo te añadiría el ibuprofeno. O paracetamol. P3: Si en el cole tienen piojos pues haces el tratamiento.” (FGA3, P8 & P7 women, low SES, Bcn; FGA3, P3, woman, middle SES, Bcn).

“Sobretot quan tens moltes coses es caduquen, pastilles, el que sigui, no ho utilitzes i es caduca. I has gastat diners.” (FGA1, P3, woman, middle-high SES, AMB).

Overall, the Health Care basket is justified by the fact that people need some medical consultations and prevention treatments even having good health in order to participate adequately in society. The Public Health Care System in our country is considered more than sufficient to cover these needs.

#### **7.4. Content: common consensus on goods and services**

The basket is composed of the following categories of goods and services: individual counselling; medical treatment for an injury; medical prevention; dental care; contraception and products to be included in the medicine chest. In this section the specific content of each of these categories is described.

##### **Individual counselling**

Non-severe diseases consultations with a general practitioner (GP) are foreseen in the basket, which are free of charge and included for individuals and families. For adults two visits a year and one home visit are taken into account. For children the number of consultations is increased. For a child between 6 and 11 years of age a minimum of four consultations a year and two home visits are estimated, plus an additional consultation for earache and the prescription for an antibiotic. For a child between 12 and 17 years of age three GP consultations a year and one home visit are included.

##### **Medical treatment for an injury**

In case of minor accidents or injuries occur the basket also includes a free of charge visit to a GP. In this case the frequency of the consultation is estimated once in a period of ten years for adults and once every five years for children.

## **Medical prevention**

The Catalan Health Care System has developed prevention programmes for cancer and establishes a planned calendar for vaccines over the life course (Agència de Salut Pública de Catalunya, 2016; Generalitat de Catalunya, 2010). According to these guidelines and taking into account that adults and children in the model family are in good health the following prevention activities are provided.

Concerning adults between 30 and 50 years old a consult to GP and the diphtheria-tetanus vaccine is recommended every 10 years. Additionally, for women between 25 and 65 years old a cervical cancer screening should be done at least every three years.

The vaccination calendar establishes the Meningococcal C vaccine for children aged 11 to 12. At this age Hepatitis A and chickenpox vaccines are also provided for children susceptible of suffering the disease. Since 2016 a combined vaccine against diphtheria, tetanus, pertussis and poliomyelitis is also compulsory for children of 6 years of age; however, the vaccination campaign will start as soon as the vaccines are available. Regarding girls aged 12 to 17 years of age two vaccines are included: two doses of Human Papillomavirus (HPV) vaccination for girls at 6<sup>th</sup> grade are provided free of charge at school and the diphtheria-tetanus vaccine for all children at 14 years of age.

The cost of these vaccinations is assumed by the Catalan government and for each vaccine a visit to a GP is also included in the basket.

## **Dental care**

Spanish citizens have to pay for the recommended annual preventive oral examination. Thus, the cost of an annual preventive consultation and screening for each member of the family, plus an additional cost for a tooth filling in case of dental caries for each adult and for the adolescent girl on a five yearly base is estimated.

In Spain, dentists fees are subject to a free market policy, so the cost of these services has been taken from a study conducted in 2004 by Facua's watchdog organization (FACUA, 2004).

## **Contraception**

A budget for contraception is provided for each man, woman and girl of the model family. Two contraceptive methods are included in the basket because they have proved to be the most effective for birth control: condoms and contraceptive pills, with 97% and 99% of probabilities to avoid conception, respectively (Dexeus, 2016b).

Thus, condoms are included for each member in the family over 12 years of age, as they also protect from transmission of diseases and contraceptive pills are also included for females. We have also included the cost of the prescription for the pill and a follow-up consultation in the first year. Thereafter an annual check up is sufficient. The contraceptive pill was included in all countries participating in the ImPRovE project following the comparative criteria, although it is considered the most expensive method, it ensures women's personal choice.

## **Medicine chest**

The medicine chest is composed of the essential products and medications that people use to have at home in case of minor injuries or diseases. The list was approved in focus groups discussions and the amounts foreseen were agreed cross-country in the ImPRovE project.

The budget includes: a thermometer (one per family); a pair of stainless tweezers (one per family); a pair of stainless scissors (one per family); one antiseptic and one ointment for minor burns per family and a coldpack and tick remover (one per family); sticking plasters (ten plasters for adults and twenty for children each year); bandages, elastic bandage, steri-strips and sterile compresses for all family members; some medications are also included for common diseases, such as for pain and fever or diarrhea both for adults and children. Finally, sunglasses, sun lotion, insect repellent and insect bite medication were added both for adults and children and anti-lice lotion and lice comb for children under 12 years old.

## 7.5. Overview of the total Health Care basket

The Health Care basket is composed of the minimum resources needed for the treatment of common every day diseases or minor injuries, diseases prevention (vaccination), dental care and contraception for people in good health. Focus groups participants living in densely populated areas agreed that the Public Health Care System is of common use and reliable to treat and prevent common diseases in our context. Thus, extra health insurance costs are not added, though some participants mentioned it could be used for dental services, which are not completely covered by the national Health Care System. Although the most part of items included in the Health Care budget are provided at no cost for families, it is observed in Table 32 and Figure 8 that the budget oscillates between 9,57 Euros for a single man to 60,01 Euros for a couple plus two children. Thus, a family with 2 children needs around 6,27 more budget than a single man.

These costs are mainly explained by the “out-of-pocket” expenses families should spend on dental care, contraception and the family medicine chest, which vary according to the composition of the household and the age and sex of its members. The presence of children in the household increases the budget for dental care and the medicine chest. Although people in focus groups agreed that the medicine chest should be limited because products could expire, the cost of some items depends on the number people (e.g. sticking plasters, bandages, sterile compresses, painkillers for fever or diarrhea). The higher costs in households with children are also explained by the number of sun lotions, insect repellents and the inclusion of anti-lice treatment. Finally, as contraception pills are not subsidized in our context the budget for this category is also higher for females, which results that a single woman needs around 2,39 more budget than a single man.

In conclusion, the Health Care budget includes an important number of services that are provided to families with no additional costs, such as general counselling visits to GP, which makes a clear institutional difference in relation to other European countries (Penne *et al.*, 2016). However, as observed dental care and some medicines costs are not completely covered by the Health Care System, which explain the final cost of the basket. In any case, it is important to bear in mind that the budget was constructed for people in good health. Thus, the resources foreseen will be clearly

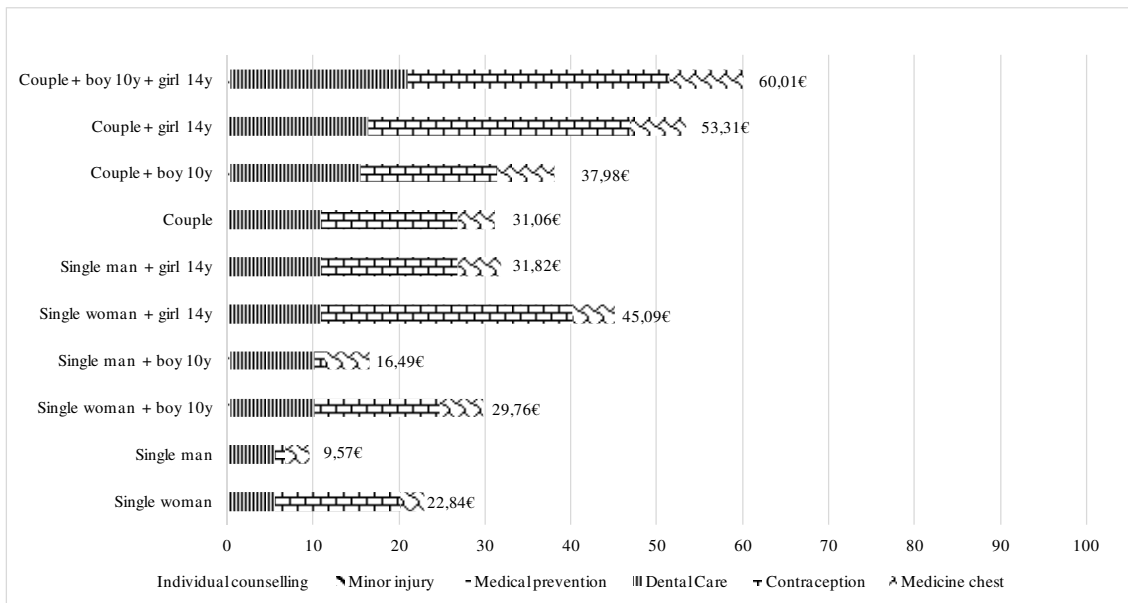
insufficient for disabled people or people suffering chronic diseases, especially the costs for medicines and some extra services required.

Table 32. Total monthly budget per health care category for various family types. Barcelona reference city, 2014.

Health care basket per category	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Individual counselling	0,00	0,00	0,23	0,23	0,00	0,00	0,00	0,23	0,00	0,23
Minor injury	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Medical prevention	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Dental Care	5,46	5,46	9,81	9,81	10,92	10,92	10,92	15,27	16,38	20,73
Contraception	14,57	1,30	14,57	1,30	29,14	15,87	15,87	15,87	30,45	30,45
Medicine chest	2,81	2,81	5,14	5,14	5,03	5,03	4,27	6,61	6,49	8,60
<b>Total budget (€) / month</b>	<b>22,84</b>	<b>9,57</b>	<b>29,76</b>	<b>16,49</b>	<b>45,09</b>	<b>31,82</b>	<b>31,06</b>	<b>37,98</b>	<b>53,31</b>	<b>60,01</b>

Source: Own compilation.

Figure 8. Total monthly budget per health care category for various family types. Barcelona reference city, 2014.



Source: Own compilation.



## **8. Maintaining Significant Social Relations**

### **8.1. Specific methodology**

This basket includes the items needed to develop social relationships with relatives and friends, which is very important for a healthy emotional life and for the development of our identity. In the absence of quality guidelines, we started from common criteria and the Belgian previous research on RBs (Goedemé *et al.*, 2015a). Therefore, focus groups arguments around this subject were important to check the items included in this basket, as well as information surveys about cultural habits.

To choose and price the items we relied on the focus groups arguments and also on local consumer surveys when available (e.g. CNMC, 2014; Fundación Telefónica, 2014). When possible, we used the same retailers as other baskets (e.g. stationary objects the same shop as school material for children in Safety in Childhood basket) or common international retailers agreed on the project with other countries. Additionally, the second round of focus groups consultations has explored the consensus among these categories between adults and children in densely populated areas in Catalonia, as well as the determinants that influence the goods and services included in the basket, such as the age of the child or the working status.

The basket is composed by the following categories. Firstly, elements for social gathering, which includes: a budget for inviting family and friends at home; a budget for going out for a meal; a budget for cultural celebrations, a budget for cards and gifts and elements to decorate the house. Secondly, items related to communication technologies: computer and Internet connection at home, printer and its accessories and a mobile phone for each adult in the household. Finally, some costs related to citizenship and stationary objects. In the next sections, the composition of the basket is described in detail.

## 8.2. Justification, content and common consensus on goods and services

### Social gathering

In the absence of guidelines to establish the resources needed for social gathering, we adapted the composition of the basket through focus groups arguments to justify the goods and services included. The second round of focus groups has confirmed that being member of a family or being friends are relevant social positions to develop in Catalonia densely populated areas. Thus, this basket specifies some of the elements to take into account for developing these social positions to allow an adequate social participation at a minimum. This time for social gathering is of great importance for both adults and children and, particularly, it is used to bonding within the family, as expressed in the following quotes:

“Yo, como trabajadores, sí que pienso que deben tener, como actividad, un trabajo que te permita pues trabajar y estar con la familia.” (FGA4, P1, man, middle-high SES, ZDP).

“Si la gent té temps lliure, el passes amb la teva família.” (FGJ3, P5, girl, middle-high SES, Bcn).

“És que jo crec que les relacions socials i descans i lleure van molt lligat, perquè una forma de descansar també és relacionar-se amb la gent.” (FGJ4, P3, boy, middle-high, SES, AMB).

Consequently, the basket specifies the resources needed to develop these social relations. As detailed in the next paragraphs, inviting family and friends to your home, going out for a meal and family celebrations were the main activities recognized by participants in focus groups in densely populated areas in Catalonia.

#### *Inviting family and friends*

People in focus groups agreed on the need to invite friends and family members to their place. They proposed to hold these gatherings at least twice a month:

“Lo ideal sería depende, una celebración en casa con unos amigos, y otra en el mismo mes en casa de los amigos.” (FGA3, P1, woman, low SES, Bcn).

“És molt espontani, no? Doncs vine a sopar, va, vens una estona i els nanos juguen mentre sopes qualsevol cosa. Dos o tres vegades al mes”. (FGA4, P6, man, high SES, ZDP).

Regarding the kind of food needed participants said that the meal should be easy to prepare and should be exchanged between families. They also pointed out that it is frequent to consume less healthy meals in these social situations. Some examples of this kind of food are shown in the quotes:

“Tot allò que has posat prohibit abans, les olives, els entrepans, les pizzes. Pa amb tomàquet...” (FGA4, P6, man, high SES, ZDP).

“El lomo, la cervecita... Y unas patatitas y unas olivitas.” (FGA4, P2, woman, low SES, ZDP).

“P3: Normalment la família que acull als que venen, doncs, fa el menjar i serveixen. P8: També poden portar els postres.” (FGJ3, P3 & P8, girls, middle-high SES, Bcn).

As families are expected to share food, the budget foresees the same amount for some savoury and sweet snacks and alcohol or soft drinks for all types of families. For each visit six beers, one bottle of wine, one bottle of soft drinks, one box of chips and one box of biscuits are included every two visits. Moreover, some extra dinnerware is added for an average of four people per visit. This extra dinnerware is based on the priced items already included in the kitchen equipment basket and adapted to the quantity required for this basket and for each family type based on the Belgian proposal. Additionally, four foldable chairs are included because it is easier to store them after use.

#### *Going out for a meal*

Focus groups participants expressed that eating out represents a moment of freedom and relaxation for all family members, and especially, at weekends. The following quote justifies this need:

“Estamos hablando de ésta familia [modelo], de una madre que debe ser ella la quién cocina, un día de salir fuera, ayuda psicológicamente, no tener que pensar qué comprar, qué tengo en casa, mira un domingo me despreocupo y no tengo que cocinar. Este momento como persona te hace sentir bien, de tener un momento entre comillas de relax.” (FGA3, P6, woman, low SES, Bcn).

They agreed to foresee a small budget to satisfy this function six times a year. The budget includes a simple menu taking the price of six randomly selected low budget stores and pizzerias, following the common criteria in the ImPRovE project.

### *Cultural celebrations*

There are four main cultural festivities to celebrate in the Catalan context within the family: Christmas Day, New Year's Eve, Epiphany and Easter Sunday. Additionally, focus groups participants in densely populated areas in Catalonia also agreed that a birthday celebration for each family member should be added as expressed in the following quotes:

“El Nadal, per exemple, has d'anar a menjar amb la família.” (FGJ1, P4, boy, middle-high SES, ZDP).

“Puntualment, si es el sant o l'aniversari o el Nadal, serà normal que facin l'esforç de variar el menú, per fer un dia diferent.” (FGA1, P5, man, middle SES, AMB).

For each celebration a budget to organise a meal is included. As expressed in the latter quote the meal should be different from everyday meals. Thus, the daily price of the healthy food budget foreseen for each family type is doubled and multiplied by the number of feasts along the year. Afterwards, it is divided by the life span (12 months) to obtain the monthly price for each family type. The celebration of the Epiphany is not included for families without children.

Moreover, and also in families with children, an additional budget to celebrate other special occasions and inviting 10 people (e.g. first communion, graduation party) was included. The resources employed are: rent a party room, decorations and new clothes for the child, food, snacks and drinks. Invitations are not necessary as the family has Internet and telephone access. Based on the Belgian proposal, we assumed a cost per child amounting the depreciation cost of a party over a six-year period, as families should have to save up for larger celebrations.

### *Cards and gifts*

According to participants in focus groups gifts are important in our context, especially Christmas night/day and Epiphany. So, we foresaw a budget for minimum three presents along the year for each adult and child in the family. A birthday present for children is taken into account in the Safety in Childhood basket. There was a common consensus that it should be a simple gift for both adults and children in the family as expressed in the next quotes: “En mi casa solo se regala a los niños, mis hijos y mis sobrinos y los más cercanos.” (FGA3, P4, woman, low SES, Bcn).

“Claro, cualquier detalle al chaval le va gustar...un coche.” (FGJ1, P5, boy, middle SES, ZDP).

“Sí, per exemple, aquesta família podria per al seu tiet, posar deu Euros tota la família i fer un regal.” (FGJ1, P3, boy, middle SES, ZDP).

Thus, three gifts of 10 Euros per each adult and 7,5 Euros for each child in the household are included. The amount for children is lower because a birthday present of 15 Euros is included for each child in the Safety basket. In addition to the gift, 6 cards per adult and 4 cards per children and stamps to post the letters are included to be used for these celebrations.

#### *Decoration of the home*

As the family and friends visits or celebrations usually take place at home some items to decorate the house are added to the budget. These elements are based on the Belgian proposal: an armchair and cushion per person, a table, a sideboard, candles, matches, vase and lampshade. The items were priced at common international retailers agreed on the project with other countries.

#### **Communication technologies**

In this section, different types of communication technologies are included according to focus groups arguments and supported by survey data. First, a computer and an Internet connection for each household. Second, a printer and its accessories and, finally, a mobile phone for each adult.

#### *Computer and Internet access*

Seven out of ten people in Spain and Catalonia own a computer and have Internet connection at home (MECD, 2012). Participants in focus groups have recognized computers and Internet as essential tools for the everyday routine for both children and adults, for work or leisure on daily bases. In the case of children, it becomes a key element for different assignments at secondary school.

The use of computers at this education level has risen. Since 2009 and until the academic year 2012-2013 the Education Department of the Catalan Government promoted the use of laptops and other ICT devices and infrastructures (Wi-Fi, interactive digital whiteboard) at school in order that students acquire competencies in the field of information and communication technologies, as well as to promote students

autonomy and team work. The project was called *Projecte Ix1* and in Barcelona nearly half of the total of schools (primary and secondary education, both state schools and private schools) implemented the programme. The project required that teachers modified the contents of the curricula and the classroom-activity because of the use of laptops by the students. In the case of the personal laptop the total cost of a small laptop for each student was 300 Euros. The family paid only half of the cost (150 Euros) and the rest was financed by the Catalan government (Consorci d'Educació de Barcelona, 2013).

Data from the study published by Consorci d'Educació de Barcelona (2013:23) says that students continue to use laptops regularly (95%), but it is difficult to maintain the use of technologies because families cannot afford the total cost of the personal laptop. Consequently and, according to participant's arguments in focus groups, at least each household should be provided with a computer and Internet connection to guarantee that no child is excluded from doing the school work required. The next three quotes emphasise the function of the computer and Internet access at secondary school level, not only for school work, but also for leisure and social relations.

“Es necesaria porque a los niños hoy en día salen de primaria, los metes en un instituto y ya te están pidiendo trabajos por Internet, incluso que se lo manden por Internet a los profesores.” (FGA6, P2, woman, low SES, AMB).

“Jo un ordinador a la nena de catorze anys potser encara, però al nen de deu anys un ordinador no, perquè jo recordo amb deu anys agafar l'enciclopèdia de cada meva i fer els treballs amb l'enciclopèdia. O sigui, no cal.” (FGJ4, P6, girl, middle-high SES, Bcn).

“Fins i tot podrien quedar els nens exclosos. O sigui, el fet de no tenir ordinador podria diferenciar dins l'escola. M: En quin sentit podria diferenciar? En jocs, que no tinguessin accés o vídeos, xarxes socials...” (FGJ3, P2, boy, middle-high SES, Bcn).

The monthly price for a laptop with a life span of five years is included in each household. A laptop is better because it occupies less space and can be carried in the case it is needed out of home. Also focus groups participants said that a laptop is more useful for children, especially when doing school work with their friends out of home, for example at friends' home or libraries. An Internet connection is also calculated based on data from the CNMC study (2014:19), which shows that 78,6% of households used

ADSL connexion to access to Internet at home (3rd trimester 2013). Cable is only used by 17,7% of households. The service most common to contract is landline telephone, mobile phone and Internet (46,9% of households, 3rd trimester 2013) (CNMC, 2014:8). The average cost of a landline telephone and Internet service is 33 Euros per month (4th trimester 2013), (CNMC, 2014:9). This is the amount included in the minimum reference budget for this service.

#### *Printer and other accessories*

One multifunctional printer is necessary per family. Participants in focus groups agreed that it was convenient for children school work and, in general, to print documents, especially, for working purposes or other official documents adults might need. A budget for ink and paper is also included. A pen drive is also added, two per family and one more if there are children over 12 years old. Focus groups said a pen drive is necessary to store a copy of the information and also to transport it, especially for children when they need to bring the work to school. The following quotes show the importance to own these accessories for adults:

“Para mí, ordenador, conexión a Internet e impresora para mi era imprescindible para mi trabajo.” (FGA3, P7, woman, low SES, Bcn).

“Perquè per exemple, un escombriaire o qualsevol altra feina no necessita tants mitjans tècnics. En aquest cas potser no serà tan bèstia com amb els nens el fet de no tenir ordinador com tampoc pot ser que no l’hagi tingut durant tota la seva vida, no el condicionarà tant.” (FGJ3, P2, boy, middle-high SES, Bcn).

“Doncs hi ha moltes coses que les pots gestionar per Internet i que guanyes molt temps en aquest sentit.” (FGJ3, P6, boy, middle-high SES, Bcn).

In any case, computers, Internet access and printers are important technologies for both children at secondary school and adults, depending on their specific working status. Nevertheless, as shown in the above citations, these items are also needed to maintain social relations and organise everyday life independently from the working status.

### *Mobile phone for adults*

Data from a study by Fundación Telefónica (2014:120) – one of the biggest telecommunication companies in Spain – shows the presence of a landline telephone in Catalan households was 82,1%. However, the possession of a mobile phone was higher 96,1% in 2013. The Internet connection through the mobile has also spread. The same study says that seven out of ten Catalans who connect to Internet do it through a mobile device. Thus, we included in the budget a simple Smartphone that allows access to Internet. According to a study by the Comisión Nacional de los Mercados y la Competencia (CNMC) the average cost of the unmetered Internet access through the mobile and voice service is around 16,3 Euros per month (data 4th trimester 2013), (CNMC, 2014:4). This is the amount foreseen for this service in the minimum reference budget.

### **Citizenship and other stationery objects**

For every citizen over 14 of age having an ID card is compulsory (Espanya, 2005, Decreto 1553/2005, Art.2.1). However, as we think it is important for security and also to guarantee sufficient autonomy of the family (e.g. going on holiday) we provide an ID card for all family members. The cost of obtaining an ID card is 10,50 Euros per person. ID cards are valid for 10 years for adults over 30 and 5 years for children and adults under 30 of age.

Concerning having the passport this is a right for the Spaniards and it is compulsory to have it when being out of the national territory (Espanya, 2003, Real Decreto 896/2003, Art.2). In a minimum budget we considered this is not necessary for the model families included, because the ID card allows today to travel all along Europe since the Schengen Agreement (1995).

About obtaining other membership cards, such as participation in trade unions, the Spanish Constitution (Art.28) says people have the right of affiliation in a trade union, but it is not something compulsory for citizens. Between 1977 and 2008 the affiliation tax of workers in Spain has been approximately below the 20% (Beneyto, 2010). Data from the Ministerio de Empleo y Seguridad Social shows that in 2010, after the impact of the economic crisis this indicator also was affected by the crisis and consequently decreased (Catalonia: 12,6%; Spain (total): 16,4%). This social position was also recognised in five out of seven focus groups in densely populated areas in



Catalonia. Therefore, as the affiliation rate is so low, this cost is finally not included in a minimum budget. In case of taking into account this cost it will suppose an additional amount between 11,10 and 15 Euros per month per adult depending on the professional category and the trade union<sup>38</sup>.

Regarding basic stationary objects we include stationary cover 10 units for each family type, 6 envelopes for each adult and 4 for each children, 10 ballpoint pens, glue, stapler, perforator and scotch tape based on the Belgian proposal. These items were priced at the same shop as children's school material, a retailer widespread in Catalonia that offers a wide variety of stationary at reasonable prices according to focus groups.

### **8.3. Overview of the total Maintaining Significant Social Relations basket**

The basket is composed of the minimum resources needed to get involved in social relations. As agreed in focus groups from the second round, people in densely populated areas in Catalonia should be able to be members of a family, make friends and establish social relations accordingly. At the same time, we observed that the number of members in the family, the age of children and the working status influences the type of resources included. Table 33 and Figure 9 illustrate the final composition of the social relations basket. The communication category is the one that requires a higher budget. For families with two adults the cost is higher due to the inclusion of a mobile phone for each adult. The cost for printer and other accessories also increases for families with children aged over 14 years old. As mentioned in the focus groups these items are necessary, especially linked to school tasks and also to adults' working status.

The budget for social gathering depends on the family type. For inviting family and friends at your place the amount for extra dinnerware is slightly bigger for families with three or more members. The cost of going out for a meal and cultural celebrations is higher for families with two adults and children over 14 years old because of the food budget. The number of cards and gifts and decoration of the home also vary according to the number of members in the household. Finally, the citizenship category increases in proportion with the number of members in the household because of the additional costs of ID cards for each member.

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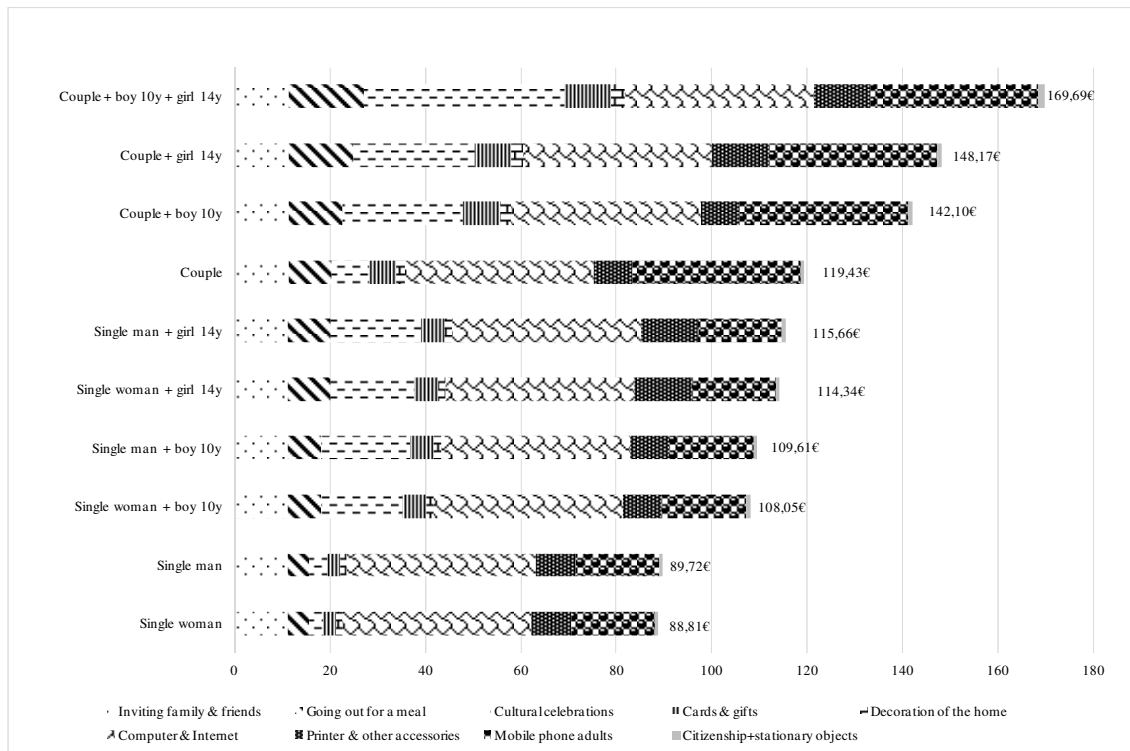
<sup>38</sup> Amount based on the quotes proposed by the two main trade unions in Catalonia (UGT and CCOO) for the year 2014.

Table 33. Total monthly budget for the Maintaining Significant Social Relations basket for various family types. Barcelona reference city, 2014.

Maintaining Significant Social Relations basket	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
<b>Social gathering</b>	<b>22,74</b>	<b>23,64</b>	<b>41,80</b>	<b>43,35</b>	<b>44,34</b>	<b>45,65</b>	<b>35,65</b>	<b>58,13</b>	<b>60,46</b>	<b>81,81</b>
Inviting family & friends	11,34	11,34	11,34	11,34	11,34	11,34	11,39	11,39	11,39	11,43
Going out for a meal	4,50	4,50	6,81	6,81	9,00	9,00	9,00	11,31	13,50	15,81
Cultural celebrations	2,79	3,70	17,08	18,64	17,44	18,75	7,95	25,23	25,37	41,91
Cards & gifts	2,84	2,84	4,94	4,94	4,94	4,94	5,68	7,78	7,78	9,88
Decoration of the home	1,27	1,27	1,62	1,62	1,62	1,62	1,62	2,41	2,41	2,76
<b>Communication technologies</b>	<b>65,39</b>	<b>65,39</b>	<b>65,39</b>	<b>65,39</b>	<b>69,13</b>	<b>69,13</b>	<b>82,99</b>	<b>82,99</b>	<b>86,73</b>	<b>86,73</b>
Computer & Internet	39,65	39,65	39,65	39,65	39,65	39,65	39,65	39,65	39,65	39,65
Printer & other accessories	8,13	8,13	8,13	8,13	11,87	11,87	8,13	8,13	11,87	11,87
Mobile phone adults	17,61	17,61	17,61	17,61	17,61	17,61	35,21	35,21	35,21	35,21
<b>Citizenship+stationary objects</b>	<b>0,69</b>	<b>0,69</b>	<b>0,87</b>	<b>0,87</b>	<b>0,87</b>	<b>0,87</b>	<b>0,79</b>	<b>0,97</b>	<b>0,97</b>	<b>1,16</b>
<b>Total budget (€) /month</b>	<b>88,81</b>	<b>89,72</b>	<b>108,05</b>	<b>109,61</b>	<b>114,34</b>	<b>115,66</b>	<b>119,43</b>	<b>142,10</b>	<b>148,17</b>	<b>169,69</b>

Source: Own compilation.

Figure 9. Total monthly budget for the Maintaining Significant Social Relations basket per category and for various family types. Barcelona reference city, 2014.



Source: Own compilation.

## **9. The Safety in Childhood basket**

### **9.1. Specific methodology**

We developed the Safety in Childhood Basket for Spain based on the Belgian proposal (Goedemé *et al.*, 2015a) taking into account Spanish and Catalan legislation, scientific literature, local survey information and national youth experts opinions. Particularly in this basket, focus groups were also important to verify the adequacy of the items that we had included.

Like in the Belgium context, our guideline is the *International Convention on the Rights of the Child* (CRC) (United Nations General Assembly, 1989) that was ratified by Spain in 1990. In the nineties, both Spain as a whole (1996) and Catalonia (1995) incorporated the principles of the *Convention* in their own legislation. Since then, particularly in Catalonia, there have been several additional legislations (Fernández Barrera, 2012).

Our main guideline to decide which items should be included in this basket was the latest law in force in Catalonia since 2010: the *Catalan law 14/2010 (27/05/2010) about rights and opportunities for childhood* (Catalunya, 2010). This law focuses on different aspects of children wellbeing from an integral and holistic approach centred on the material resources and immaterial (physical, mental, spiritual, moral and social development). Articles No. 37 and No. 41 emphasise that ensuring the necessary life conditions for this integral development is parents/tutors duty. Public authorities should adopt measures to ensure that parents or tutors have the opportunity to provide them with a basic level of material welfare for an adequate integral development.

The pricing was based on surveys on local habits that estimated the costs for some of these activities (e.g. OCU (2013) survey on Education costs; or Protégeles (2005) (mobile phones for teenagers)). When possible, the same retailers than in the other baskets were chosen (e.g. healthy food, suitable clothing or personal care); otherwise we followed experts recommendations and focus groups opinion.

In the next paragraphs, the composition of the basket is detailed in the following categories: day trip, teenager's mobile phone, birthday party, youth association, toys, cultural activities, education and pocket money. Additionally, focus groups from the second round have provided children's point of view, as well as finding consensus

among these categories in densely populated areas in Catalonia and its determinants: age of the child; working status and place of residence.

## **9.2. Justification, content and common consensus**

### **Day trip**

A local study by Kid's Cluster (2014) reveals that there is a trend to recover "outdoor" family leisure activities as a unique and authentic experience, where all members of the family could get out of the daily routine. Secondly, another field of activities are those linked to the use of new technologies at home as a domestic leisure activities (e.g. videogames, Wii). Finally, there is a trend to do activities that stimulate creativity through the return of traditional games, but also using new technologies, through apps. Regarding this latter field Internet connexion and mobile phones are included in the Maintaining Social Relations basket. But, which "outdoor" activities should we include for day trips?

Participants in focus group discussions in Catalonia densely populated areas concluded that there is a wide variety of recreational activities to do in urban areas, as well as the importance to spend their free time with the family. The next quotes illustrate this reasoning:

"A zones molt rurals hi ha moltes coses que no poden fer. Hi ha pobles que no tenen equipaments esportius. Clar, si pensem en que pot anar caminant per la muntanya, sí. A pobles petits no tenen opcions de teatre, altres vegades tampoc tenen museus." (FGA5, P3, woman, high SES, Bcn).

"Disponer de tiempo libre con ellos, ¿no? Hacer actividades de ir a jugar a básquet, o ir al cine...O al parque a darle un paseo."(FGA6, P5, man, high SES, AMB).

"Ir un día a la playa te cuesta zero como puedes ir un día al museo de la ciencia o ir al cine o ir a, no sé, a parques temáticos o cualquier cosa que creo que por un día es una experiencia muy divertida para un niño." (FGA2, P5, woman, middle-high SES, Bcn).

At the same time, museums and some cultural events are free of charge or at reduce price for children aged under 16. Thus, the Safety in Childhood basket provides at a minimum 4 activities per year families have to pay for in Barcelona: 2 sport activities (cycling and swimming) and 2 family visits to museums. A expense of two Euros per person for a drink is foreseen for each person and day trip. The total annual

cost of these four activities for each family type is divided by twelve months to obtain the price per month. Moreover, families could develop along the year other outdoor activities free of charge (e.g. going to the beach, walking...etc) due to the favourable climate. For doing these activities there is no extra travelling cost. The different transports included in the Mobility basket would cover the journeys for these activities.

### **Mobile phone for teenagers**

In Spain, secondary compulsory education (called ESO, in Spain) begins at the age of twelve. In many cases, there is a change of school at this stage. Then, it is likely that daily routines also change (going alone to school, meeting with friends before or after classes, among others). In this context, parents may consider to allow their child to have a mobile phone. On one hand, this device could be used as a tool to control children; on the other hand, it gives them some freedom. Six out of ten Catalan children aged 10 to 15 had a mobile phone in 2011 (Idescat, 2012). The following quotes express this function of the mobile phone for teenagers:

“És a dir, en quan a autonomia en el cas de la ESO què vol dir, doncs, que van sols a casa i els hi dones les claus i un telèfon per si passa algo. Doncs, és aquí ja quan comencen.” (FGA5, P7, man, middle-high SES, Bcn).

“Depèn molt de la nena. D'on visqui i del que fa, perquè si fas una extraescolar i la fas a dos passes de casa teva, no necessites el mòbil per res. Però si la fas a mitja hora i t'han de venir a buscar en cotxe, potser si el teu pare no pot venir, o ve tard, t'haurà d'avisar.” (FGJ4, P7, girl, middle-high SES, AMB).

Thus, these coincident arguments from children's and adults' point of view, confirm that a mobile phone is necessary for each teenager over 12 years old. However, mobile phones have an extended variety of functions. This means mobiles are not only used for family calls, but also used as a social platform to chat with friends, to play games or to exchange pictures. In other words, mobiles are used for leisure and social purposes. Some of these applications require an Internet connection (e.g. for the message system *Whatsapp* or other social network platforms very common with teenagers in our country (*Facebook, Tuenti*). Focus groups participants argued that a mobile phone with Internet connexion available is considered important to enable teenagers “social life”. It is definitely a social tool to be considered “inside the group” of teens. In this way, the mobile is also an element that guarantees that teenagers could

develop some social positions, such as being friends or classmates. The next citations illustrate this use of the mobile phone by teenagers:

“En el momento que tú sí que le permites el móvil, si no tiene una conexión a Internet, no lo querrá, es una cosa social. No es un tema de llamada.” (FGA2, P1, woman, middle-high SES, Bcn).

“O sigui, parlen d’alguna cosa, i hi ha un que no té mòbil, no s’ha enterat del que ha passat. O de si hi ha un treball i jo tinc un grup de la classe i si un professor ho diu a un alumne i l’alumne ho ha de dir a la classe ho diu pel grup [de WhatsApp], i si un no té mòbil, aquella persona no s’entera.” (FGJ3, P5, girl, middle-high SES, Bcn).

Consequently, we foresaw this possibility for teenagers using a Wi-Fi connexion through a Smartphone with a life span of three years and a pre-payment card of 12€ per month (Protégeles, 2005). According to a study by CNMC (2014) pre-payment cards is the most common form of mobile payment among children aged 10 to 14 (53,5%).

### **Birthday party**

A budget to organise a simple birthday party was also included. Participants in focus groups said it is something important for children, although it might differ according to the age of the child. Both adults and teenagers agreed that older children might go out to celebrate with friends, while parents will try to organise a party for younger children. Among adult participants, there was a common consensus on the fact that it should be something feasible to organise with a minimum budget. For this reason, they proposed to invite only 5 or 6 friends as expressed in the following quotes:

“Pero tienes que hacer una cosa, yo llevo llevando a mi hijo desde los 5 años a estos sitios, tienes que coger sólo a 5 amigos porque sino el presupuesto se te va.” (FGA3, P7, woman, low SES, Bcn).

“Algún año hemos montado una noche en casa con el grupo más pequeñito, una fiesta de pijama en tu casa, que no se te van a 200€.” (FGA6, P5, man, high SES, AMB).

In this section we include a simple menu and the minimum resources needed for the celebration of the birthday of a 10 year-old child at home, as it is the least expensive option. So, sweet and savoury sandwiches were included, as well as a cake and candles, juices, sodas, chips and some party material (e.g. table napkin, balloons, sweets). The total cost of these elements was divided by twelve months to obtain the price per month.

Besides the party, 15 Euros for buying a birthday present for each child (10 years old or 14 years old) was added in the section Toys.

### **Membership to a youth association**

Catalonia has an extensive network of social entities in the field of leisure and youth that develop multiple activities (sports, education actions in the leisure time or cultural activities) (Ferrer Frigola, 2009; Truñó Salvadó, 2012). In addition, the *Catalan Law 14/2010 (27/05/2010) about rights and opportunities for childhood* emphasises in article nº 35.1 the right of children to create, participate and be a member of youth associations. Article nº 57 focuses on the right of children to receive educative activities in their leisure time - either from these social entities or from their family - in order to develop responsibility and commitment to the community.

According to both articles, we think it is important to include the cost of membership in a social entity that promotes these values and enables sports, leisure and cultural activities. A survey published by Organización de Consumidores y Usuarios (OCU, 2013) estimates for the academic year 2013-2014 in Spain an average amount of 38€/month for extracurricular activities along the academic year (9 months). Additional clothing equipment for both children (boy of 10 years of age and girl of 14) are foreseen in this basket for these activities (e.g. training, swimsuit and washcloths).

Participants in focus groups pointed out that there will be difference by sex and age regarding the type of activities, as well as depending on child's motivations or the type activities which are fashionable in certain time. However, this variability is really difficult to take into account. What it is important is to foresee this minimum budget necessary for an adequate social participation of children that responds to the following functions as expressed in the focus groups in the different territories. Firstly, it allows parents to achieve work and family life balance. Secondly, these activities have also an educative function complementary to the lessons at school. Thirdly, adults and teenagers in focus groups expressed that the participation in this entities help expand their circle of friends and reinforce the development of the social life of children.

“Quan són petits, és més necessitat familiar, de complementar l’horari, quan són més grans ja són més per l’educació complementaria de l’educació dels fills.” (FGA5, P7, man, middle-high SES, Bcn).



“Tres días a la semana mínimo tiene que venir, pero porque quiero yo que desconecte un poco, se relacione a parte de su colegio y tenga otra forma de ver las cosas y de otros ámbitos, de otras personas, no solamente de su colegio.” (FGA6, P2, woman, low SES, AMB).

“Doncs per tenir noves amistats, perquè quan ets petit tens els amics del cole, però a part dels del cole, també has de tenir més amistats. Llavors jo crec que les extraescolars ajuden a expandir les teves amistats i veure a gent d’altres coles que pensen diferent.” (FGJ3, P3, girl, middle-high SES, Bcn).

Moreover, their participation in leisure activities and organisations continues in summer. Apart from being an essential activity for children to socialize, according to expert advice and focus groups discussions the participation in summer camps is also linked to the lack of measures to balance work and family life in our country; the long period of school vacations (nearly 3 months) and the lack of public space in the big cities. In order to solve this demand there is a wide variety of summer camps options offered through state or private entities in Catalonia with different pricing rates depending on the accommodation options and type of activities. For example, the Generalitat de Catalunya plans a public programme of summer camps for children between 5 and 16 years of age in which the lowest rate was 342 Euros for 8-day summer camp combining English classes and leisure activities and the highest rate was for theatre activities 487 Euros for the same duration (Generalitat de Catalunya, 2016).

The differences in prices within the sector and the most convenient activities make it difficult to decide how to estimate reasonable minimum cost for this in our country. In the ImPRovE project, due also to this difficulties, this cost was not included for comparability reasons between countries.

## **Toys**

The Catalan law also recognises the right of children to play (article nº 58.2). The article understands playing as an essential element for growing up and maturing. The game is essential to guarantee the maturing process through the children psychomotor, cognitive, social and emotional development according to children needs in each developmental stage. Thus, the toys to be included in a minimum budget should respond to the following categories for both children in the model family (a 10 year-old boy and a 14 year-old girl): physical development (moving and sensory materials);

symbolic game; construction; rules; videogames. The only difference between these two development stages is that toys become more sophisticated and complex for teenagers and there is more diversity due to the use of Internet or mobile phone apps also considered as a toy for teenagers nowadays (Marín, Penón & Martínez, 2008).

Particularly, from an expert point of view, between 8 and 11 years old, the use of videogames should be considered as a family activity, so it is better to look for a screen videogame situated for example in the living room (Marín *et al.*, 2008; Marinva, 2012). Videogames used as a family activity could be an educational opportunity as it favours the communication and helps to develop stronger bond between parents and children. Despite different opinions about the use of videogames, participants in focus groups agree on this educational and social function:

“Yo creo que de entrada son individuales, y normalmente no son educativos, o sea, son juegos de diversión y ya está, ¿no? Que también va bien, pero hay otros juegos que facilitan más el juego en familia y son más educativos.” (FGA2, P1, woman, middle-high SES, Bcn).

“El que és cert és que la consola ajuda, i això no ho podem negar, la consola et fa que et diverteixis, et fa poder fer amics, et fa ser un referent, et fa doncs aprendre.” (FGJ2, P8, boy, high SES, AMB).

Regarding the introduction of Internet apps, the Maintaining Social Relations Basket foresees an Internet connexion for each household.

It is important that toys are safe for children to use them. From an expert point of view the shops that guarantee quality, a wide variety of games, and also good value for money are the following: Abacus Cooperativa or Toys'rus and some department stores or supermarkets, especially during Christmas period (Carrefour, Al campo, Caprabo or El Corte Inglés).

Another characteristic to take into account according to recent data from Asociación Española de Fabricantes de Juguetes one characteristic of the toy market in Spain is the seasonality of consumption of toys in Christmas. This organization concludes that because of this practice Spain has one of the lowest rate of spending on toys per child/year (135€) and calculates that a Spanish child receives 7 toys per year. However, experts in the field recommend for educative reasons to reserve the most

especial toys for Christmas or as a birthday gift and redistribute the purchase of toys along the year because of children's need to play daily (Marín *et al.*, 2008).

In addition, participants in focus groups added that certain social games do not require many material resources (e.g. “*pilla-pilla*”). However, adult participants recognize that playing in the street in urban areas is more dangerous nowadays than in the past, which results in children playing more at home with indoor toys.

“P4: Per jugar no fa falta material, o sigui, l’objecte no fa falta. Per exemple, al “*pilla-pilla*” no necessites res. Per jugar a la bandera hi ha gent que potser es porta un mocador, però no fa falta. P5: Hi ha material al carrer.” (FGJ1, P4, boy, middle-high SES; P5, boy, middle SES, ZDP)

“Era una situació excepcional, però, clar, quan parles amb gent gran en zones urbanes, o sigui la gent baixava al carrer i jugava el carrer.” (FGA5, P7, man, middle-high SES, Bcn)

Consequently, the budget includes the cost of five toys along the year that respond to the different categories identified by experts, plus a budget of 15 Euros to spend on a birthday present.

### **Cultural activities: cinema, theatre and concerts**

Participation in cultural activities and artistic life is also recognised in the Catalan law (article nº 34.1). Moreover, article nº 71 emphasises that public administration must promote access to cultural goods and cultural media for children. This participation is understood as essential for the learning process and to develop intellectually.

Therefore, and according to focus group discussions, a minimum budget to go 2 times per year to the cinema is sufficient because there is the possibility to watch DVD at home. The experience of attending other type of performances (theatre play or concert) was also seen important for the development of children. So, we estimated the same amount included for adults in the Leisure basket for this type of participation. Participants agreed that children should be accompanied by an adult to these events, especially in urban areas, so we added also the cost to meet this requirement. This is why the budget to develop these activities for a child of 10 years old is higher.

“Perquè si vols anar al teatre necessites temps a part de diners. Necessites temps per poder estar amb ells.” (FGA5, P7, man, middle-high SES, Bcn)

“La nena podrà anar sola al cine i al nen l’hauran d’acompanyar si vol anar.” (FGJ3, P6, boy, middle-high SES, Bcn)

## **Education**

From the age of 6 to 16 Education in Spain and Catalonia is compulsory and free of charge as established in the *Spanish Constitution* (article No. 27.4) (Espanya, 1978) and the *Statute of Autonomy of Catalonia* (article No. 21.4) (Catalunya, 2006). Additionally, the Catalan law about rights and opportunities for children emphasises in the article nº 48.1 that children and adolescents have the right and the obligation of receiving compulsory education and the right to receive non-compulsory education (Catalunya, 2010).

Despite these principles, there are some costs that have to be covered by parents, such as a small fee for enrolment, participatory activities and some materials for school work. Hence we include the costs of these elements in a state school because we believe it is more adequate in a minimum income context: school enrolment, which includes school insurance tax and a membership of parents association; school books and a budget for school excursions; school material (e.g. gym bag, notebooks, pencils, etc) and school clothes (e.g. 2 school smocks for primary school children). We did not include in this basket school meals, because less than the 50% of the children use the school lunch service (Diputació de Barcelona, 2011), neither ICT equipments (computer and Internet) for school work because it is included in the Maintaining Significant Social Relations basket. Also, the mobility costs, to go to school, are included in the Mobility basket. In this section, we describe and justify the list of items and its costs according to our context.

Regarding the school insurance tax and parents association cost, OCU survey (2013) estimates and average annual amount of 39 Euros and 21 Euros, respectively. As mentioned in the focus groups it is important for the child and the parents to belong and participate in the school parents association in order to guarantee a good teachers-parents relationship, get on well with other families and children and benefit from activities organised by the association.

For school books and excursions we relied on the same survey that estimates an average of 189 Euros/per academic year for buying new school books and 24 Euros/per month for annual excursions, this means 216 Euros/per academic year as the school term lasts nine months. Following the same procedure for other items we divided the amount by twelve months to obtain the price/month for each category. As participants in focus groups have pointed out that recycling books is still not applied in all state or private schools in Catalonia, thus this represents a considerable out of pocket expenses for parents:

“P3: Los libros de texto cada dos años o tres los van cambiando; P1: Hay colegios que son más sensibles con este tema y por lo tanto lo tienen más en cuenta y hacen más socialización de libros.” (FGA2, P1 and P3, women, middle-high SES, Bcn)

Participants in the focus groups agreed on other school material to develop school tasks such as sufficient stationary items especially for secondary school children (e.g. notebooks, files, pens, etc) and minimum home equipment (e.g. chair and desk). For primary children school children two school smocks were also added to the budget. The items were priced online according to the shops suggested by participants and divided by its life span to obtain the price per month.

“Alguna libreta. Bueno, aquí pone carpetas pero muchas veces también son carpasanos con separadores. [...] Necesitan tener un estuche bastante completo. Se necesitan colores, rotuladores, bolis, la goma, el compás...” (FGA2, P3, woman, middle-high SES, Bcn)

“Cada uno lo que tiene es su mesa de estudio y se las apaña. Eso es básico. Y su silla. En la habitación, en un sitio que se pueda estar un buen rato. Si te vas al Ikea es súper económico.” (FGA3, P7, woman, low SES, Bcn)

### **Pocket money**

Participants in focus groups agreed on including a small amount for pocket money in the budget for each child depending on the age. This pocket money is normally given for an educative purpose and should allow children to become autonomous and responsible for its use, as shown in the quotes:

“Depèn de l’edat, però que hauria de ser poc i aleshores tu has d’anar estalviant perquè fins i tot deu Euros te’ls pots gastar amb el que vulguis.” (FGJ3, P4, girl, middle-high SES, Bcn).

“A veces reciben un premio porque se han portado bien o han sacado buenas notas y ellos van haciendo su *guardiola*.” (FGA6, P8, woman, middle-high SES, AMB).

As there are no standards on this question, we should rely on the amounts that participants expressed in the focus groups. Thus, we foresaw for a 10 year-old boy 5 Euros/month because a child at this age is always accompanied by an adult in the cities. However, we doubled the amount for a 14 year-old girl. In this case, we foresaw 10 Euros/month. Both could have 5 Euros as extra money per month when going out with friends (e.g. to have a drink, snack...etc).

### **9.3. Overview of the total Safety in Childhood budget**

Table 34 and Figure 10 summarize the total budget for the Safety in Childhood basket for the various family types. The total budget is slightly higher for families with secondary school children, particularly for the inclusion of a mobile phone and the higher amount for the pocket money. In the other categories we observe few differences between primary and secondary school child, although the budget is also higher for the latter due to the inclusion of a birthday party, the higher costs for toys and the budget for cultural activities as the cost for an adult accompaniment is also taken into account. The Safety in Childhood budget is higher for couples, especially because of the additional costs of an adult for the day trips.

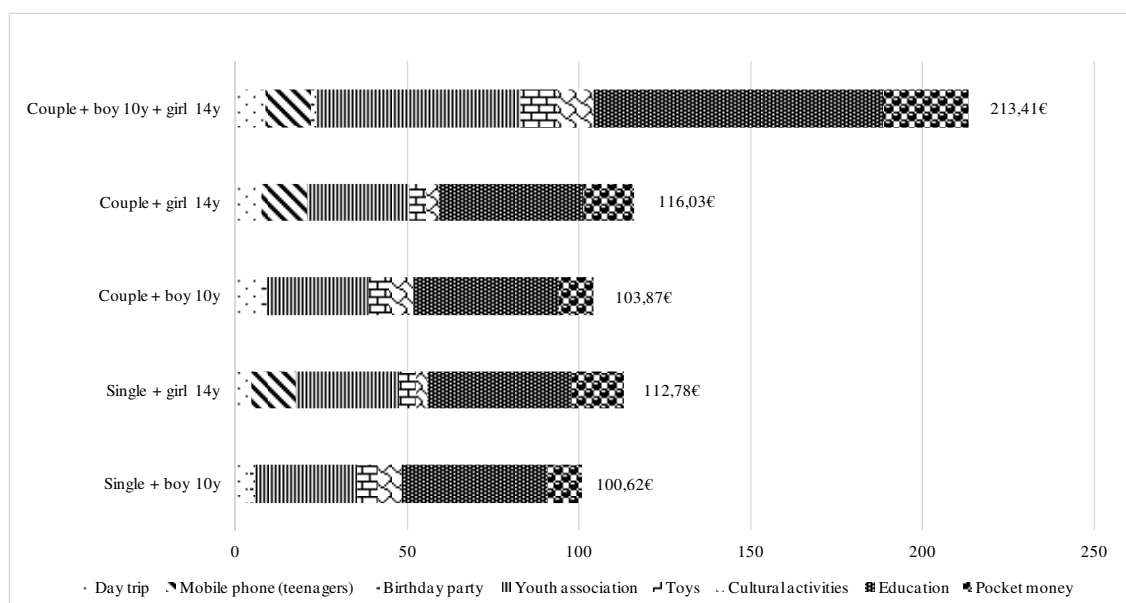
In conclusion, we have highlighted a common consensus on the goods and services needed to develop safety in childhood in densely populated areas in Catalonia. The main variable that influences the composition of the basket is the age of children. The working status of parents appears to be a determinant of the social participation of children in youth associations, while living in urban areas, is a key factor to contextualise the use of toys, as well as guarantees a wide access to free of charge or low cost activities to develop with children.

Table 34. Total monthly budget for the Safety in Childhood basket for various family types. Barcelona reference city, 2014.

Safety in Childhood basket	Monthly price (€)				
	Single + boy 10y	Single + girl 14y	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Day trip	4,15	4,33	7,40	7,58	8,48
Mobile phone (teenagers)	-	13,31	-	13,31	13,31
Birthday party	1,48	-	1,48	-	1,48
Youth association	29,65	29,77	29,65	29,77	59,43
Toys	6,07	4,88	6,07	4,88	10,96
Cultural activities	7,00	3,50	7,00	3,50	10,50
Education	42,28	41,99	42,28	41,99	84,26
Pocket money	10,00	15,00	10,00	15,00	25,00
<b>Total budget (€) /month</b>	<b>100,62</b>	<b>112,78</b>	<b>103,87</b>	<b>116,03</b>	<b>213,41</b>

Source: Own compilation.

Figure 10. Total monthly budget for the Safety in Childhood basket per category for various family types. Barcelona reference city, 2014.



Source: Own compilation.

## **10. The Mobility basket**

### **10.1. Specific methodology**

In order to develop social participation and the activities foreseen in the different baskets the family members need to be mobile. In the ImPRovE project the RBs were developed for families living in cities with an extensive network of public transport. In our case, the mobility costs were specified for families living in Barcelona and its metropolitan area.

In absence of guidelines, the costs of the mobility goods and services were estimated mainly using survey data and the experienced based knowledge of participants in focus groups. The basket includes a budget to be used for public transport on a daily bases, the cost of a bike and a return ticket for the holiday trip for each member of the family. Moreover, a budget to purchase and maintain a second hand car was added. The pricing procedure for the mobility basket was done in 2014 using online data available regarding public transport fares and survey data for private transport. Concerning the bicycle accessories we used the retailers mentioned by focus groups participants to acquire sport clothes and material.

The second round talks with children and adults has achieved consensus about uses of different means of transport in densely populated areas in Catalonia. Particularly, the place of residence is the factor that influences most. In addition, the age of children also determines the mobility budget. In the following paragraphs the detailed composition of the basket is described.



## 10.2. Justification of the Mobility need

In the case of Barcelona metropolitan area, the public transport network covers more than 14.000 km and only one fourth of its population uses private motor transportation on a daily bases. The rest of personal moves are by means of public transport, bicycle or on foot (ATM, 2013:64). Participants in focus groups in densely populated areas in Catalonia agreed that all these mobility options should be considered in a minimum budget for an adequate social participation to allow the development of the different social positions (e.g. being a student/pupil; being a worker; being friends). The next quotes justify this argument:

“P5: Mobilitat per desplaçar-te, per portar els nens al cole, per treballar...; P3: Per relacionar-te.” (FGJ2, boys, P3 middle, P5 middle-high SES, AMB).

“Clar, en una ciutat normalment, la feina no la tens al costat de casa, perquè és com impossible. En una ciutat et mous en metro, o públicament o privadament.” (FGJ1, P4, boy, middle-high SES, ZDP).

“Jo crec que depèn del lloc on visquis, si has d’anar per dintre la ciutat tampoc agafaràs el cotxe, pots anar amb transport públic.” (FGJ3, P6, boy, middle-high SES, Bcn).

In cities bicycles are getting more and more popular, although they are mostly used by young citizens and represent only a small part of the movements in Barcelona. These data indicate that public transport is the most used form of mobility in Barcelona area. This fact was confirmed during the focus groups, in which the participants agreed that although a car can be useful to do some leisure activities, it is too expensive and unnecessary, since the public transportation network is quite good enough within Barcelona and its metropolitan area. However, the budget for a car was also added in the ImPRovE project taking into account that it gives to families more freedom of movements to develop the different social positions for an adequate social participation. Moreover, the second round of focus groups in densely populated areas in Catalonia justifies the need of a car in urban areas with less access to public transport as shown in the following quote:

“És que jo crec que per desplaçar-te fora de l'àrea metropolitana encara és més necessari tenir un cotxe. Vull dir, a mesura que et vas allunyant de Barcelona veus que els trens i els autobusos passen cada més temps... T'has d'esperar més. Canvia bastant.” (FGJ4, P7, girl, middle-high SES, AMB).

The estimation of the costs of the different means of transport in Barcelona and its metropolitan area for the year 2014 is described in the next sections, as well as a selection of the main arguments from focus groups that justify the inclusion of these goods and services for the mobility need in densely populated areas in Catalonia.

### **10.3. Content: common consensus on goods and services**

#### **Public transport budget**

##### *Monthly ticket for public transport*

The Integrated Fare System makes it possible to use the different means of transport (underground, bus, tram, Ferrocarrils de la Generalitat de Catalunya (FGC) and RENFE) in the same journey within the Metropolitan Region extended to the limits of the local rail services, and the neighbouring regions of l'Anoia and el Bages, including a time for transfer between transports. There are several tickets and fares that can be purchased depending on the mobility needs. All the necessary movements to fulfill the needs specified in the rest of budgets (e.g. family outing, holiday, journey to hospital, visiting relatives, going to the theatre or cinema...) were taken into account for the calculation of the mobility basket. Thus, for every household member over 14 years old we included a '50-30' travel pass with a monthly price of 42,5 Euros which allows for 50 integrated journeys on 30 consecutive days from its first use on all means of transport, which is reasonable for adults and children over 14 years of age in the model family. In order to do the activities foreseen in the baskets probably at least 2 journeys a day will be needed.

In 2014 children between 4 and 13 years of age could get a personalized ticket called 'T-12' for a total cost of 35€ for the ten years period. Adults participants in focus groups manifested that mobility costs represent considerable out-of-pocket expenses for parents, especially when having children over 14 years old.

“Clar una família que tingui fills en aquestes edats entre 15 i 25 anys i que els dos o tres fills estudiïn és que el mes que et toca comprar són 300 Euros! Bueno, tenen descompte, però vaja poc...És una despesa brutal.” (FGA5, P4, man, middle SES, Bcn).

Progressively, this age range has been widened. In 2016 children aged 14 could use the card (Generalitat de Catalunya, 2015). More recently, in January 2017, the card changed its name to “T-16” and could be used by children until they are 16 years old for the same price (ATM, 2016). The more widespread use of the public transport has allowed

maintaining the same fares for these tickets in the past two years (Generalitat de Catalunya, 2015).

These modifications show a better awareness from a policy-making point of view, as mobility costs were kept low during all the compulsory schooling period. Nevertheless, for students until 25 years old the public transport system only offers a bonus of 105 Euros for an unlimited number of integrated journeys for 90 consecutive days from the first use on all different types of transports. This means 35 Euros/month, which is lower than the price of a monthly '50-30' travel pass. According to participants in focus groups a three month bonus is not as useful if there is a holiday in the middle of the period, so a good planning is necessary to amortize it.

#### *Holiday budget*

As presented in the Leisure basket participants in focus groups proposed feasible options within the territory, such as going to other villages, the beach or the countryside by means of public transport or car. Thus, for travelling to the holiday place (coast/mountain) once a year we included a minimum cost that guarantees a wide range of public transport options and areas to spend the holiday more than 80km away from the city. Thus, we calculated a return ticket twice the price of a 6 zone of the Barcelona suburban railway area (6,15 Euros/per single ticket). Children between 7 and 13 years of age have a 40% discount of the adult price (3,69 Euros/per single ticket) (RENFE 2014). The total price was 24,6 and 14,76 Euros per year for adults and children, respectively. This amount was divided by 12 month to obtain the price per month.

#### **Bicycle budget**

The mild climate all year round favours pleasant cycling. However, in 2012 only 2,5% of the journeys in Barcelona and metropolitan area were done by bike (ATM, 2013:64). One of the problems to use bike on a daily basis is the lack of adequate and independent bike tracks that allow a safer cycling. At the same time, more tolerance and respectfulness between the different participants (drivers, cyclists and pedestrians) is needed as pointed out in the following quotes:

“Pels adults, i no per a tots. Has de tenir una certa habilitat i una certa pràctica aquí per poder-te moure en bicicleta.” (FGA5, P6, woman, middle-high SES, Bcn).

“Els cotxes i les bicicletes són bastant incompatibles.” (FGA5, P4, man, middle SES, Bcn).

Despite these difficulties, a budget for a bike per family member is considered for comparability reasons within the ImPRovE project. The items included are a bike and the necessary equipment for a safe riding: helmet, cycle lock, bicycle pump for each family member; bike bag, bike basket and set of tools for adults. Additionally, a monthly budget for bike repairs is included, which covers an annual revision for maintenance and adjustments and change of the tire, oil and light every five years. The price of these goods and services has been done through a widespread retailer in our territory specialized in sports clothes and material as mentioned in the focus groups (Decathlon, 2014a & 2014b).

In any case, although the bicycle is recognised as a way of transport in densely populated areas in Catalonia, some limitations have been pointed out in the second round of focus groups discussions. People agreed that bikes are useful for mobility or leisure activities, but still they are seen as impractical to cover all the family mobility needs (e.g. going shopping) as expressed in the following quotes:

“Jo vaig molt amb bicicleta però a títol personal, amb la família és molt complicat.” (FGA5, P3, woman, high SES, Bcn).

“Jo vaig amb bici a tot arreu. La clau és si no has de carregar res. Si no has de carregar res, la bici és útil.” (FGJ4, P4, boy, high SES, AMB).

“A la ciutat, per exemple, per anar a comprar, ja no pots. Perquè si no tens temps, compres un cop a la setmana. Amb la bicicleta ja et dic jo que no pots portar-ho.” (FGA4, P6, man, high SES, ZDP).

For this reason, the bike has an occasional use in our context and appears as a complementary element to satisfy the mobility need in densely populated areas in Catalonia. As shown in Figure 11 it represents a smaller part of the total mobility budget. People rely more on the public transport system on a daily basis and the use of the car as described below.

### **Private transport budget: car costs**

With the aim to consider the cost-convenience of a private means of transportation, in addition to the cost of public transport and a bike for each family member, the cost of a second-hand car was added to allow people more freedom of movements. Particularly, the use of private transport increases for needs such as work up to 45,7% in Barcelona and its metropolitan area (ATM, 2013:64). Other arguments that participants in focus groups gave to include a car were the following: for holiday purposes and shopping as expressed in the quotes:

“Tener coche en el día a día es importante. Pero a ver, si nos ponemos a decir si es necesario pues no. Te va a dar que puedas ir a una montaña o hacer un picnic a, bueno, si te quieres ir de vacaciones.” (FGA2, P5, woman, middle-high SES, Bcn).

“Muchas veces el diseño mismo de la ciudad te obliga incluso a comprar en coche a las grandes superficies. O sea, lo tendrás más fácil coger el coche para ir a una gran superficie que ir a comprar a la tienda del barrio que no tendrías ni que andar tres cientos metros.” (FGA4, P1, man, middle-high SES, ZDP).

The budget for a car is based on the common criteria established in the ImPRovE project, which only takes into account the fixed cost: purchase of a second hand car, an extended third party insurance, circulation taxes up to 11,99 horsepower (Ajuntament de Barcelona, 2014); its maintenance and repair based on average amount for the year 2014 and petrol for 10.000km for a car that spends 6L every 100km<sup>39</sup>. This estimation leaves out variable costs such as for parking. In total the cost of a car sums 215,99 Euros/month for each family type, which should be added to the mobility budget. As agreed in focus groups the car is convenient when visiting places outside Barcelona centre and its Metropolitan Area, especially, areas with less accessible by public transport.

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<sup>39</sup> Use of different sources of information: Coches.net (2014); Kelisto.es (2014) and study from Audatex (El Mundo, 2015).

#### **10.4. Overview of the total Mobility basket**

Table 35 summarizes the total monthly Mobility budget for various family types. Firstly, regarding the public transport budget, it is observed how the cost increases for households with two adults and children over 14 years old. Differences in the public transport budget in 2014 are explained by reductions applied to children under the age of 14. Secondly, the total bicycle budget depends on the number of members in the family. The age and sex of the family members also determines the budget because the characteristics of the bike and its accessories are chosen according to these variables. The bicycle budget represents a smaller weight within the mobility budget, as shown in Table 36. Finally, the inclusion of a car increases the total monthly mobility budget. As illustrated in Table 36, when the cost of a car is added it has an important weight on the mobility budget, particularly, for single households (around 80% of the total monthly mobility budget). While bigger families benefit from economies of scale when sharing a car. For example, the cost of a car for a family composed of four members represents around 58% of the total monthly mobility budget.

In absence of guidelines, the composition of the basket was checked throughout focus groups discussions. Participants accepted the different ways of transport proposed and found them essential to fulfill the social positions in densely populated areas in Catalonia. Referring to the public transport they considered it sufficient. The price-freezing measures and the recent discounts applied for children fares in 2017 covering all the secondary education period are important advances, although for students fares are still expensive. However, for people living in urban areas less well communicated or when going out on a journey out of Barcelona and its metropolitan area the inclusion of a car was justified by the focus groups participants.

Table 35. Total monthly budget for the Mobility basket for various family types. Barcelona reference city, 2014.

Mobility basket	Monthly price (€)									
	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Public transport budget	44,55	44,55	46,07	46,07	89,10	89,10	89,10	90,62	133,65	135,17
Monthly ticket	42,50	42,50	42,79	42,79	85,00	85,00	85,00	85,29	127,50	127,79
Holiday budget	2,05	2,05	3,28	3,28	4,10	4,10	4,10	5,33	6,15	7,38
Bicycle budget	5,52	6,35	11,25	12,08	10,15	10,99	11,88	17,60	16,51	22,23
Private transport budget (car)	215,99	215,99	215,99	215,99	215,99	215,99	215,99	215,99	215,99	215,99
Total price without car (€) /month	50,07	50,90	57,32	58,15	99,25	100,09	100,98	108,22	150,16	157,41
Total price with car (€) /month	266,06	266,89	273,30	274,14	315,24	316,07	316,96	324,21	366,14	373,39

Source: Own compilation.

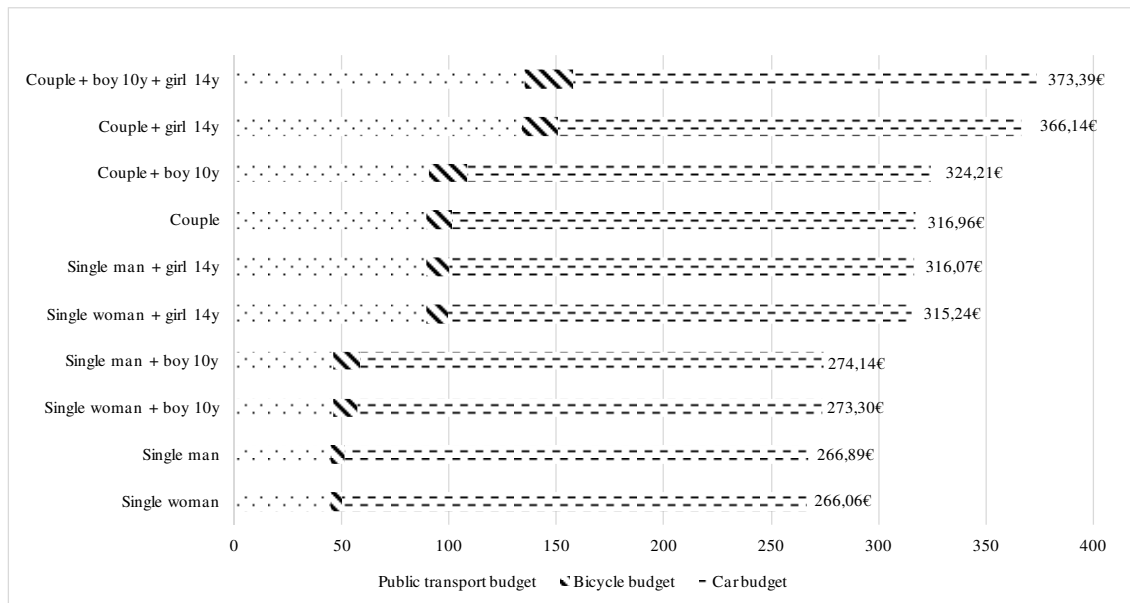
Table 36. Weight of the different categories within the Mobility budget with car costs (%). Barcelona reference city, 2014.

Mobility basket	Single woman	Single man	Single woman + boy 10y	Single man + boy 10y	Single woman + girl 14y	Single man + girl 14y	Couple	Couple + boy 10y	Couple + girl 14y	Couple + boy 10y + girl 14y
Public transport budget	16,74	16,69	16,86	16,81	28,26	28,19	28,11	27,95	36,50	36,20
Bicycle budget	2,08	2,38	4,12	4,41	3,22	3,48	3,75	5,43	4,51	5,95
Private transport budget (car)	81,18	80,93	79,03	78,79	68,51	68,33	68,14	66,62	58,99	57,84
Total with car costs	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00

Source: Own compilation.



Figure 11. Total monthly budget for the Mobility basket for various family types with car costs included. Barcelona reference city, 2014.



Source: Own compilation.

## 11. Housing costs in Catalonia densely populated areas

According to Doyal & Gough (1994), adequate housing is an essential intermediate need to guarantee a healthy life and develop individual autonomy. In order to establish the goods and services required to fulfil this need a different approach was proposed within the ImPRovE project. Due to the heterogeneity of the housing market and housing policies across the participant countries, it was difficult to establish the number, quantity and price of the items to be included. Instead and, to better guarantying cross-national comparability, reference costs for an adequate housing were calculated for the different territories either for owners and tenants using statistical data available.

Starting from the universal criteria proposed by the authors above, the coordinating team from Herman Deleeck Centre for Social Policy at the University of Antwerp (CSB-UA)<sup>40</sup> estimated the cost of a modest but adequate dwelling for the six cities for which RBs were developed within the ImPRovE project: Antwerp, Athens, Budapest, Barcelona, Helsinki and Milan. More precisely, the costs were calculated for households meeting some quality criteria throughout quantile log-linear regression models with a subsample of densely populated areas in the region in which the reference cities are located using EU-SILC 2012 data, which contains an additional module on housing (Goedemé *et al.*, 2015a). Afterwards, the costs were updated to 2014 price levels using the specific Consumer Price Index in order to add these costs to the sum of the other baskets priced in 2014.

Therefore, in this chapter the purpose is to contextualise the data regarding housing costs for Catalonia densely populated areas for dwellings meeting certain quality criteria obtained within the ImPRovE project and calculated by the coordinating team. Housing costs represent a large share of the total budget, especially, for tenants in the different countries and, also in our context (Goedemé *et al.*, 2015a; Cussó *et al.*, 2016). For this reason, it is important to comprehend the housing market, as well as observe the suitability of the common quality criteria for an adequate housing in Catalonia in order to interpret the results. Hence, the chapter is structured in three sections, as follows.

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<sup>40</sup> The CSB-UA research team that carried out the analysis of housing costs for the different cities within the ImPRovE project was lead by Dr. Karel Van den Bosch, who kindly provided us with the data for housing costs for Catalonia's densely populated areas.

First, we present a brief review on the housing market and policies in our context. This information is built using literature, expert advice and local statistical data from the *Enquesta de Condicions de Vida i Hàbits de la Població 2011* (ECVHP 2011). ECVHP 2011 is the latest edition of an official survey with a representative sample for Catalonia, which every five years gathers information about the life styles and living conditions of the population using a methodology harmonized with EU-SILC by Eurostat (Trullén (dir.), 2014). This survey gives specific data of the city of Barcelona and its Metropolitan Area nearby and is elaborated by Institut d'Estudis Regionals i Metropolitans (IERMB) and Institut d'Estadística de Catalunya (Idescat).

Second, quality criteria for an adequate housing are discussed in our context. Following the same procedure than in other baskets, minimum quality criteria for dwellings were previously defined in the ImPRovE project to assure that the estimated costs will refer to an adequate housing. Then, using guidelines and ECVHP 2011 we describe to which extent the quality requirements are present in our context. Additionally, arguments from focus discussions are commented in order to check the acceptability of these criteria in Catalonia densely populated areas.

Finally, housing costs for adequate dwellings in densely populated areas in Catalonia are presented in relation to the structure of the housing market, as well as contrasted with ECVHP 2011 data. Thus, after this contextualisation of the estimated housing costs within the ImPRovE project, with the aim to point out their importance when developing RBs these costs would be added to the total budget in the next chapter.

### **11.1. Contextualisation of the housing market in Catalonia**

Unlike other countries in the European Union, Spain is predominantly a home-owner culture and so are Catalonia and Barcelona. According to data from the ECVHP 2011 in Catalonia, 74,3% of households were home owners and 23% were tenants. An analysis by Bosch-Meda (2014) points out that 82% of households in the highest income quintile are owners of their main residence, while this percentage goes down to 68% for households in lower income quintiles. Regarding the type of tenure of the main residence in Barcelona and its province the situation is very similar, although the proportion of tenancy is higher: 58% are home-owners (41% in fully paid property and

17% paying mortgage) and 36% are tenants in the city. In the province of Barcelona<sup>41</sup>, the percentage of home-owners increases until the 67% of households (39% are fully paid properties), while only 24% are tenants (Porcel (coord.), 2012).

Thus, despite ownership remains the main option, renting is becoming an increasing practice. In the context of the economic crisis preferences among the population are changing. The renting market has started to be significant in the areas where the prices for buying a house were higher, particularly in Barcelona and areas nearby (Oficina de Promoció i Gestió de l'Habitatge (dir.), 2012).

The home-owner culture in Catalonia has to be understood in the context of a Mediterranean Welfare State, where the family becomes the main agent that guarantees welfare. Although, initially, buying a house entails a huge financial burden, it is socially perceived as a good investment for the future. The property acquired is considered to be a kind of private social protection. There are two other main reasons that have had an influence on the development of a home-owner culture. On the one hand, one should take into account the easy access to advantageous credit conditions –of note, between 1999 and 2007, the annual cost of a mortgage was cheaper than the annual cost of renting in Spain (Aramburu Otazu, 2010). On the other hand, historically housing policies such as tax relief for the purchase of a house have promoted the home-owner culture, although such exemption has been recently cancelled (Pina, 2012).

Nowadays, due to both credit and tax relief restrictions, unemployment, economic uncertainty and the high prices of housing, among others, the home-owner culture has been put into question. Renting is becoming a more valued option among Catalans because it suits better today's economic uncertainty and changing life-style (Aramburu Otazu, 2010; Bosch-Meda, 2014). Additionally, there has been a general decrease in renting prices between 2008 and 2013 in Barcelona, the Metropolitan Area and Catalonia, which make renting a feasible option (Consorci Metropolità de l'Habitatge, 2015). Particularly, the number of rental contracts in Barcelona has grown from 27.414 to 44.411 between 2008 and 2014 linked to a decrease in renting prices in the same period: monthly average renting costs have decreased, between 2008 and 2014, from 1.062,7 € to 688,2€ (or 14,6€/m<sup>2</sup> to 10,2€/m<sup>2</sup>, usable square meters) (Dpt. Estadística. Ajuntament de Barcelona, 2012 & 2016).

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<sup>41</sup> The province of Barcelona concentrates 19 out of 23 municipalities in Catalonia over 50.000 inhabitants (INE, 2016 i Idescat, 2016e). So, it is the most densely populated area in Catalonia.

However, the renting market is still insufficient and the prices continue to be high, which make access difficult. Aside from the financial difficulty of having decent housing, there are other acknowledged problems in the Barcelona metropolitan area, such as the lack of enough social housing – in 2011 only 0,9% of dwellings were considered for social rent in Catalonia – and the necessary rehabilitation of the buildings (Bosch, 2011; Bosch-Meda, 2014).

## **11.2. Quality criteria for an adequate housing**

### **Common quality criteria for an adequate housing in Europe and Catalonia**

Doyal & Gough (1994) defined three universal criteria for an adequate housing: (1) should offer protection against disease and climate conditions, so it should be a secure place for people to live in; (2) should promote an hygienic life style, guarantying that clean and hot water is available; (3) should provide sufficient space to avoid overcrowding. Although the authors admit that adequate housing is culturally determined, they argued that this previous principles are essential for the development of a good physical and mental health.

The above criteria were assumed in the ImPRovE research to develop the housing basket cross-nationally comparable by the coordinating team (CSB-UA) based on previous reference budget research in Belgium (Goedemé *et al.*, 2015; Storms & Van den Bosch, 2009). These quality conditions for an adequate housing have been also used as criteria for the calculation of reference housing costs in the project *European Reference Budgets Network* (European Comission, 2016; Van den Bosch, Goedemé, Schuerman & Storms, 2015 & 2016). Thus, the mentioned projects define some variables to assess these quality criteria for a decent housing in order to estimate reference values for housing costs throughout EU-SILC.

First, an adequate shelter should be exempt of moisture problems (leaking roofs, damp walls, floors and foundations or rot in window frames or floors). Secondly, for the development of a hygienic life style the dwelling should be equipped with bath or shower, an indoor flush toilet and adequate plumbing water. Finally, to avoid overcrowding one bedroom for each child of different sex, especially, if there is an adolescent child, is required; then, and based on European parameters, a single person household needs at least one bedroom or studio about 38 usable square meters and for couples with two children 3 bedrooms and a minimum space of 73 usable square meters

is required. Other facilities that are to be taken into account are safe and adequate heating and electrical installation.

Concerning Catalonia, in December 2012 a new regulation regarding adequate housing was approved by the autonomous government of Catalonia. The regulation establishes if a house has the minimum conditions to be used and weather it is suitable to dwell in. If these conditions are guaranteed, the “certificate of occupancy” is granted (Catalunya, 2012). This new regulation focuses mainly on technical aspects, but there are some guidelines on necessary amenities (lounge, toilet, kitchen...etc) and the minimum amount of living space per person, although different criteria are applied depending on the type of building (new constructions; used houses; public housing or renewed houses). For example, dwellings in new built houses should have at least the following amenities: one room or living room, a bathroom, a kitchen and no less than 36 square meters in area. Most of the criteria mentioned coincide with the ones proposed in the mentioned research projects.

In order to know in what extent Catalonia dwellings reach these requirements, we could refer to ECVHP 2011, which contains information on these facilities (Bosch-Meda, 2014; Porcel (coord.), 2012). In the next paragraphs we summarize the data available about quality criteria in Barcelona and Barcelona’s province.

### **Overview of the main quality criteria in dwellings in Catalonia**

Data from the studies above show that problems such as leaks or humidity have only been identified in 17% and 19% of households in Barcelona and its province, respectively. The survey also shows that the Catalan dwellings are equipped with essential amenities for a hygienic life style: 99% of households have bath or shower at home, 98% have indoor toilet either in Barcelona and Barcelona’s province; hot running water is also available in 97% and 98% of households in Barcelona and its province, respectively.

In Catalonia the average size of households is two people per dwelling and overcrowding is estimated on average in 3% of households, though this rate is up to 7% for renters. Nevertheless, only 14% of Catalan population claims experiencing lack of space at home. In Barcelona and its province this problem is estimated in 12% of households. Additionally, around 13% in Barcelona and 10% of households in Barcelona province are affected by a lack of natural light. Regarding to central heating

systems nearly a third of Catalan dwellings are not equipped with this type of installation, one of the highest percentages in Europe according to Bosch-Meda (2014). In Barcelona and its province only 57% and 67% of dwellings have this facility, respectively (Porcel (coord.), 2012).

ECVHP 2011 shows that apartments are the most common type of dwellings in Catalonia (75% of households). The average size of the apartment is 84 usable square meters. The study of Bosch-Meda (2014) highlights that 73% of Catalan population are not in a situation of substandard housing, meaning they do not suffer any of the following difficulties: lack of shower or bath, indoor toilet or natural light and problems of leaks and humidity.

To sum up, all these data contextualises the situation in our territory regarding the fulfilment of the European criteria for an adequate housing. In nearly all aspects Catalonia households meet the quality requirements, except for heating. At this stage and, being aware that also adequate housing is culturally determined, as stated in Doyal & Gough (1994), the focus groups discussions have been a complementary tool to check the acceptability of these quality criteria in Catalonia densely populated areas.

### **Citizen's point of view about an adequate housing**

Housing as an intermediate need has been discussed in focus groups, with adults and teenagers, all of them living in Catalonia densely populated areas. In general, a common consensus on housing quality conditions and supplies has been identified. Utilities such as running water, electricity and heating were seen as essential for a decent housing, as argued in the next quotes:

“M: Com definiries un habitatge digne? P1: Habitatge digne referint-se a tenir electricitat, l'aigua corrent...Bueno, habitatge digne també inclou dutxa...” (FGJ2, P1, boy, middle SES, AMB).

“El tema de salut doncs tot el tema de tenir cobert... l'aigua, tenir calor... no passar fred...Tenir una casa, no?” (FGA4, P4, man, middle-high SES, ZDP).

“Bueno, els serveis bàsics. Com diu la gent, té aigua, té llum, té ventilació.” (FGA5, P7, man, middle-high SES, Bcn).

Participants agree that these services are important for health reasons and to protect against climate conditions, especially, in winter. Other conditions were also mentioned in focus groups for an adequate dwelling. Children participants also understood that an adequate dwelling should provide security. They also mentioned the role of the neighbourhood community. For example, in order to maintain neat and tidy the building. Finally, it was mentioned that sufficient space should be provided for each family member. As signalled in the next quote this was seen as an important requirement for households with children. Children should have enough space, especially for studying:

“P5: Que hi hagi espai per tots els membres de la família. P1: Sí, pels nens que puguin estudiar i que no estiguin en el menjador amb la televisió. Que l’habitació sigui prou gran o un espai que puguin estar en silenci.” (FGA5, P5 & P1, women, middle-high SES, Bcn).

All in all, the citizen’s point of view approved the quality criteria for an adequate housing in densely populated areas in Catalonia. Thus, these quality criteria are important to take into account when estimating housing costs in our context.

### **11.3. Housing Costs in Catalonia densely populated areas**

In this section the housing costs for adequate dwellings in densely populated areas in Catalonia are presented. On the one hand, we present the costs extracted from ECVHP 2011, the most recent local data available in our context. On the other hand, we report the results obtained within the ImPRovE project elaborated by the coordinating team, which have been calculated through EU-SILC data and developed from a cross-nationally comparable perspective for the six participant cities in the project. Although both results are estimated using different methods, the figures reflect some common trends regarding housing costs in our context.

#### **Local data on housing costs**

ECVHP 2011 survey contains data on housing costs either for owners and tenants. Housing costs include the rent, in case it is a rented dwelling, the mortgage payments including amortization and interests, if it is not a fully paid property, and the costs of maintenance: residents’ association, energy costs (water, gas, and electricity), insurances and some municipal taxes on housing (Porcel (coord.), 2012).

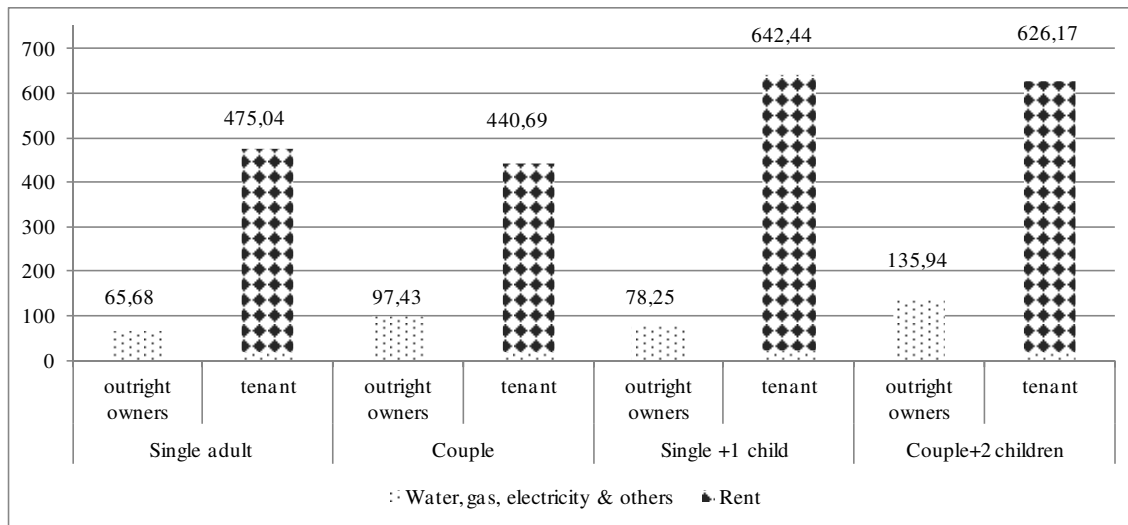


According to ECVHP the average total housing costs in Catalonia for the year 2011 was 501 Euros per month including rent or mortgage payments and the maintenance costs. The latest are estimated to represent a 40% of the total costs, while the rent or mortgage would correspond to the remaining 60%. However, the average total costs also depend on the type of tenure Bosch-Meda (2014:224). In order to check these differences and have detailed information on these costs by type of tenure, as well as taking into account some quality criteria, a specific demand to access these data was submitted in 2013 to Idescat, one of the responsible institutions who elaborated the survey.

The Figure 12 reflects the average cost of housing in Euros per month of the main residence for owners and tenants of dwellings meeting certain quality criteria by family type for Barcelona in 2011. Regarding the type of tenure the ECVHP 2011 distinguishes the following categories: owner by inheritance or family donation; fully paid property; property with mortgage payments, renters and other type of tenure. The ECVHP 2011 questionnaire does not take into account separately the category of social or private housing. In fact, the majority of transactions in Catalonia take place in the private housing market, which still predominates in our context (Oficina de Promoció i Gestió de l'Habitatge (dir.), 2012). Therefore, due to the low number of relevant observations for all types of tenure described when crossing by family type, quality criteria and housing costs, the main categories finally analysed were owners and tenants, and the selected quality criteria were: households equipped with bath or shower at home, indoor toilet, hot running water and without leaks or moisture problems. Finally, the chosen family types were those agreed for developing the ImPRovE project: single-member household, aged less than 65; 2 adults both aged less than 65 without supported children; 1 adult and 1 child; 2 adults and 2 supported children.

We observed that housing costs for tenants are higher than for owners. The housing costs included for the latter refer only to the maintenance costs and it is higher for couples with children. These costs are lower for tenants because only the costs for utilities are included. In this case, for tenants the higher costs are for families with children, either single parent households or couples.

Figure 12. Average cost of housing (main residence, meeting certain quality criteria, Euros/month) for owners and tenants by family type. Barcelona city, 2011.



Source: Data from ECVHP 2011, provided by Idescat. March 2013. Note: Singles and adults less than 65 years old. Households equipped with bath or shower at home, indoor toilet, hot running water and without leaks or moisture problems.

These results should be carefully interpreted as we do not know the effect of other quality criteria such as the size of the dwelling, the type of the dwelling (e.g. apartment) or the area where the dwelling is located. Particularly, in Barcelona rent costs vary between neighbourhoods. For example in 2011 the renting price in Euros per usable square meters oscillated from 14,39€/m<sup>2</sup> to 10,41€/m<sup>2</sup> depending on the district. The same source points out that from 2011 to 2014 the prices in the renting sector have decreased in the city, from 752,9 to 688,2 Euros/month and so have declined the prices in Euros per usable square meters. In 2014 were established between 11,90€/m<sup>2</sup> to 8,40€/m<sup>2</sup> depending on the area. (Departament d'Estadística. Ajuntament de Barcelona, 2012, 2015 & 2016).

As mentioned, despite this reduction in renting prices, it seems that housing costs for tenants continue to be high, particularly in Barcelona's area, which poses problems of accessibility. In particular, Bosch-Meda (2014:228-229) using ECVHP 2011 data estimates that Catalan tenants at market price need on average 46% of the household disposable income to meet housing costs. This analysis highlights that there is a problematic on housing accessibility in our territory, which locates Catalonia in a very bad position with respect to other countries in the European Union.

## **Housing costs within the ImPRovE project**

Within the ImPRovE project housing has been considered a basic need in order to have an adequate social participation in the six European reference cities for which RBs were developed. Adequate dwelling should not only provide protection, security, a hygienic life style, but also it is understood as a key space to develop the social positions (Goedemé *et al.*, 2015a). Thus, the dwelling should meet certain requirements and so, some costs are associated. In order to develop the housing basket from a cross-nationally comparable approach EU-SILC 2012 data was used. In this case the coordinating team from CSB-UA estimated the cost for an adequate dwelling in densely populated areas in the region in which the reference cities were located throughout quantile log-linear regression models. The costs were calculated either for owners and tenants (private sector and reduced rent), although in this section the results focus only in the categories out-right owners and private tenants, because as mentioned before reduced rent has a very few impact in Catalonia.

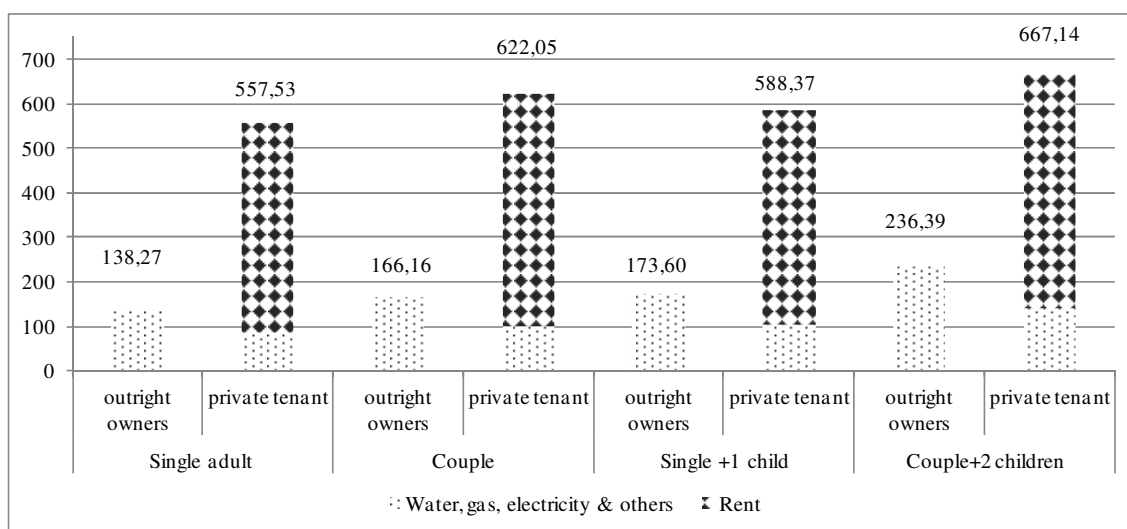
Regarding out-right owners the costs, excluding mortgage payments, are the following ones: gross housing benefits, structural insurance, mandatory services and charges (e.g. sewage removal, refuse removal), regular maintenance and repairs, taxes and utilities costs (water, gas, electricity and heating). For tenants the rent, utilities costs and the other housing costs, only if applicable (Van den Bosch, Goedemé & Shuerman, 2014; Van den Bosch *et al.*, 2015 & 2016).

As the estimated housing costs should refer to adequate dwellings, the dwellings selected in the sample should meet some quality criteria. The indicators selected were based on the common EU indicators on housing deprivation, material deprivation or guidelines and available at EU-SILC. The cases that meet the following criteria were introduced to the regression: no moisture problems, shower or bath and indoor flush toilet, heating and adequate plumbing/water installations and adequate electrical installations. Other quality criteria included in the regression were the size and the number of rooms in the dwelling. Additionally, the next independent variables were also used in the regression as seem to be characteristics that have an impact on housing costs, such as: the type of dwelling (apartments), the duration of contract, central heating facilities. Finally, other categories related to the values of the reference family: the region, population density, age of the oldest person, single or couple households and number of children. The reference costs were calculated for the four hypothetical

reference family types for which RBs were developed in the ImPRovE project: single adult in working age, couple composed of two adults in working age, single person in working age, plus a child of 10 years old, couple in working age with two children (boy 10 years old and girl 14 years old). (Goedemé *et al.*, 2015a; Van den Bosch, Goedemé & Shuerman, 2014; Van den Bosch *et al.*, 2015 & 2016).

The Figure 13 shows the monthly total housing costs in Euros at the 30th percentile for a modest but adequate dwelling, meeting the quality criteria mentioned above, for Catalonia densely populated areas estimated through EU-SILC 2012 and updated to 2014 price levels. The values at the 30<sup>th</sup> percentile express the costs that households actually pay for a dwelling in this specific quality conditions and assures to avoid lowest costs. Although it is an arbitrary point chosen by the authors, it ensures that a number of dwellings are available in the market with these characteristics, while the 70% of dwellings with these characteristics would pay more (Van den Bosch *et al.*, 2015).

Figure 13. Total monthly housing costs in Euros/month at the 30th percentile for a modest but adequate dwelling in densely populated areas in Catalonia. ImPRovE project, 2014.



Source: EU-SILC UDB 2012 – version 2 of August 2014, updated to price levels for the first half of 2014, using the harmonised consumer price index for housing, water, electricity, gas and other fuels from Eurostat online database, see Goedemé *et al.* (2015a). This data was provided by CSB-UA, the coordinating team of the ImPRovE project.

The results obtained from this method indicate that housing costs for an adequate dwelling are higher for tenants due to the high amounts for rents. However, the utility amounts and other costs are lower for tenants, as they are exempt of some costs that only involve owners. Families composed of two adults and two children, either owners or tenants, are estimated to have higher housing costs. At the same time, we observe that, for both types of tenure, as the family grows in number of members the utilities costs and other costs increase. In the case of owners, single parents with one child need 26% more budget to meet the cost for an adequate dwelling than a single person household, while couples with children need 42% more budget than a household composed of two adults. For tenants these proportions are around 20% and 40%, respectively for the utilities and other costs. The rent costs does not vary much between family types couples spend 11% more budget than single adults alone; and couples with two children pay 9% more for an adequate dwelling than single parents and one child. A likely explanation for this observation is that an additional bedroom is needed in families with children of different ages.

#### **11.4. Overview of housing costs in Catalonia densely populated areas**

To conclude, the above data reflect the higher housing costs to meet a dwelling with certain quality requirements for families with children, especially for private tenants in Catalonia densely populated areas. Although the local data obtained through ECVHP 2011 has been estimated using limited quality parameters and refer to average housing costs, the same trend is observed for the Barcelona in 2011. Therefore, both data point out an imbalance in the housing market, which is unfavourable for tenants, who have to face higher rents costs in a country where social housing is marginal (Bosch-Meda, 2014).

Nevertheless, we have to bear in mind that the estimated housing costs within the ImPRovE project are reference paid amounts for dwellings with certain quality characteristics of major consensus in Europe. These requirements have also been found in regulations regarding adequate housing in Catalonia (Catalunya, 2012) and data from ECVHP 2011 indicate that dwellings in densely populated areas in Catalonia satisfy most part of these minimum conditions (Bosch-Meda, 2014). In addition, participants in focus groups identified these characteristics as essential for a decent housing, particularly facilities that enable a healthy and protected home, as well as sufficient space for all members.

Taking into account the particular structure of the housing market in densely populated areas in Catalonia and the fact that quality criteria are suitable for our context, the estimated housing costs within the ImPRovE project would be added in the next chapter to the total reference budget.

## 12. The total budget

The composition of the baskets of the essential goods and services associated to the intermediate needs in order to have an adequate social participation in our context has been presented in detail in the previous chapters. The baskets have been elaborated for thoroughly-decribed family types using a normative approach, as well as taking into account citizens' point of view.

The purpose of this section<sup>42</sup> is to draw up the total reference budget for ten family types by adding the budget of the different baskets already developed. In this way, we could estimate what is the minimum budget needed for families to have an adequate social in densely urbanised areas in Catalonia, taking Barcelona as reference.

First, the relative weight of the baskets in relation to the total budget is described and differences between family types. In addition, it is showed how the total budget and the share of the different baskets vary when car costs and housing costs are included. Secondly, we would calculate the added costs that adults and children represent in a household and the derived equivalence scales at the level of the reference budgets. Concretely, we would observe differences between primary and secondary school children, as these are the profiles developed in this research. Finally, we will conclude with some comments regarding this issue.

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<sup>42</sup> This chapter is partly based on Cussó *et al.* (2016).

### **12.1. Overview of the total reference budget for various family types**

Table 37 shows the estimated total monthly budget and the detailed baskets for various family types. The total cost of the reference budget per month ranges from 422€ (single woman) or 453€ (single man) to 1549€ for a four member family without including housing and car costs.

In the case of single individuals, we observe differences in the total budget due to gender influence in the estimation of the goods and services needed, mainly in the Healthy Food, the Personal and Health Care baskets and less importantly in the Mobility and Maintaining Social Relations baskets. Although the dietary guidelines do not specify recommendations for each gender, the nutritional needs for men are usually higher than for women. Therefore, the lower portion threshold suggested in the dietary guidelines by the SENC (2004) was taken as a reference for women and the upper threshold was applied to men. Differences in the amounts of food included for celebrations are also responsible for the gender differences in the Maintaining Social Relations basket. Concerning Personal and Health Care baskets, the inclusion of specific products for women (body hygiene and hair care, categories of the Personal Care basket) and contraceptives pills (in the Health Care basket) increased the total costs of these baskets for women. The slight differences in the Mobility basket are due to the type of bike considered depending on gender.

As reflected in Table 38, the Healthy Food basket represents the most important share of the total budget in all family types from 33 to nearly 40% depending on family type. On the contrary, the Rest and Leisure basket is the one with less weight on bigger families (couples and couples plus children) because of the shared costs of some items – for example, staying in a shared hotel room for siblings and also because of free of charge outdoor activities possible to do because of the mild Mediterranean climate. Concerning the Maintaining Social Relations basket something similar occurs. It is highly relative to the total budget for singles and couples from 20% to nearly 16%, respectively of the total budget, while it represents a less important cost for bigger families with three or more members between 13% and 11% on the total budget.



The relative weight of the other baskets in the total budget depends on the household size and particularly the presence of children. Clothing costs represent a similar proportion of the total budget in all family types between 11 and 13% of the total budget, but is bigger in families with primary school children being the 2<sup>nd</sup> or 3<sup>rd</sup> main basket in relation to the total budget. This observation can be explained by more items included for each category of clothes for children understanding that they need to change more often than adults because when playing they get dirty quite easily. The Safety in Childhood basket represents the second most important share of the total budget without housing and car costs when the family is composed of more than one child (couple with two children), followed very closely by the clothing basket in the 3<sup>rd</sup> position. The fact that not all school expenses are covered by the government (for example school material and books) represents an added out-of pocket expenses for parents. The Personal & Health Care baskets represent a very low proportion in relation to the total budget. The fact that the majority of products for personal hygiene are available in supermarkets at an affordable price and that a free of charge universal health care system is provided by the state results in a reduction of the payments by citizens.

Regarding mobility costs, public transport in Barcelona is subsidised for children. This policy helps a lot to reduce mobility costs in families with young children. Also the good quality and extended network of public transportation system in Barcelona and its Metropolitan Area was seen in the focus groups discussions as adequate and advantageous for social participation with no need to use a private transportation system, such as a car. However, the possibility to have a car for leisure activities and especially during holidays was seen as a need because it gives families more freedom, which favours social participation. This is the reason why we tried to estimate separately the additional monthly costs of having a car (around 215€/month). For singles the costs of a car results in 49% more budget (654€) than a single without a car (438€) (see Table 37) and if added it would represent a weight around 40% of the total budget, more than the food basket. However, as the family size increases the additional weight of a car diminishes representing around 32-27% of the total budget for a 2 members household; between 25-24% for 3 member household and 21% for a family composed of 4 members (see Table 38).

In addition, the relative weight of various baskets would be modified if housing costs were considered. In Figure 14 is added to the total budget the cost for an adequate dwelling meeting some quality criteria in densely populated areas in Catalonia using EU-SILC 2012 developed through quantile log-linear regression models by the coordinating team (Goedemé *et al.*, 2015a).

For private tenants at market price, the housing cost represents between 56% to around 30% of the total budget without car depending on the household type. This means that housing basket represents the main cost for families, after the Healthy Food basket. The weight of housing costs relative to the total budget diminishes for outright owners, between 24 - 13% and also the weight of these costs depends on the composition of the household. It is observed that as the household size grows, the weight of the housing costs relative to the total budget diminishes, both outright owners and private tenants, which indicate the presence of economies of scale (Goedemé *et al.*, 2015a; Penne *et al.*, 2016). In addition, these data should also be interpreted in a context where home-owner culture predominates, with high renting prices in Barcelona and urban areas around it and a social housing market not very developed (Bosch, 2011; Oficina de Promoció i Gestió de l'Habitatge (dir.), 2012).

All in all, we observe that the inclusion of housing costs and private transport not only increase the total budget but also modifies the weights in the total budget. Therefore, the food basket does not stand any more for the largest share of the total budget when these costs are taken into account. Moreover, the composition of the household and the type of tenure influence these weights.

## 12.2. Children costs per baskets and family types

The normative approach enabled us to compare the budgets between household types and estimate the direct additional costs for an adult or a child (Saunders 2000; Storms & Van den Bosh, 2009). We have calculated these costs using a deductive variant method, described by Oldfield & Bradshaw (2011:134) as follows: “deducting the budget for a single person from the budget for a lone parent with one child and the budget for a childless couple from the budget for a couple with two children”. In our case, we took the average cost (man/woman) for the single person household, because it compensates some differences between woman and man budgets, particularly lower costs for woman in the Healthy food basket (Penne *et al.*, 2016). Therefore, according to our estimations, the total budget without car and housing costs obtained for a couple (756€) is 73% more than the average minimum budget for a single person household (438€), see Table 37.

Moreover, we could calculate the added costs for households with children. A single parent household with a 10 year-old boy needs 75% more budget (764€, lone parent woman) than a single adult living alone (438€, average amount between woman and men) without car costs. The additional costs are higher when the child is a 14 year-old girl (872€, single parent woman with 14 year-old girl), which represents nearly twice the amount of a single adult household (438€). Couples with a 10 year-old boy need 48% more budget (1117€) than a couple without children (756€), while having a 14 year-old girl would represent 61% more budget (1217€). For a couple with 2 children the added cost for children is more than two-fold the amount needed for the couple alone (1549€). On the one hand, we observe that children expenses have a big impact on the total budget, particularly for single parents, because they represent almost the expenses of an additional adult. On the other hand, as the size of the family grows and some costs are shared these differences in the added costs are smaller.

This question becomes more obvious when adding the housing costs, which result in flatter equivalence scales because of the large shared costs, as shown in Table 40. The scales illustrate the weight attributed to adults and children of different ages by tenure status compared to the modified OECD equivalence scale, the one that is used for the calculation of the at-risk-of-poverty threshold. The scales based on the reference budget approach are obtained dividing the cost of the additional member (adult or child)

in a certain family type by the average cost of a single person with the same standard of living (Browning, Chiappori i Lewbel, 2006). It is observed that equivalence scales derived from the reference budgets from a needs-based perspective estimate higher costs for children than the OECD scale, especially for secondary school children.

Table 40. Equivalence scales derived from the reference budgets by type of tenure compared to the modified OECD scale.

Equivalence scales	Modified OECD scale	RBs Without housing costs	RBs With housing costs (private tenant)	RBs With housing costs (outright owner)
1 <sup>st</sup> Adult	1	1	1	1
2 <sup>nd</sup> Adult (>=18 years old)	0,5	0,73	0,38	0,60
Child (6-11 years old)	0,3	0,75	0,36	0,63
Child (12-17 years old)	0,5	0,99	0,47	0,82

Source: Own computation, except for housing costs. EU-SILC UDB 2012 – version 2 of August 2014, updated to price levels for the first half of 2014, using the harmonised consumer price index for housing, water, electricity, gas and other fuels from Eurostat online database, see Goedemé *et al.* (2015a). This data was provided by CSB-UA, the coordinating team of the ImPRovE project.

In order to understand better the differences between the budgets assigned to primary and secondary school children we estimate the costs for each child depending on the household type using again the deductive variant method separately for each basket. In Table 39 we specifically focus on the costs for children in each of the baskets. In general, we realised that the expenses for a child increase with age and how the age-sex combination influences the results as other research has pointed out (Oldfield & Bradshaw, 2011; Saunders, 2000; Storms & Van den Bosch, 2009). In our RBs the additional costs of a secondary school girl (14 years old) in a single parent household (449€) represents between 30% more budget than a 10 year-old boy living in the same type of household (346€). Nevertheless, results on Table 39 show how the weight of the various baskets relative to the total budget for children changes depending on the age of children.

It is clear that the Healthy Food basket is the one that represents the highest proportion of the total budget assigned to children. The second most important basket relative to the total budget for children is Safety in Childhood. As mentioned in the previous section, this is due to certain expenses for education that are not fully

subsidized by the government. These expenses represent between 29 and 25% of the total budget for children depending on the age of children and the family type.

The third more important basket for families with primary school children is the Clothing basket, where it represents nearly 17% and 14% respectively (Table 39). The budget is higher for families with primary school children due to the short lifespan of clothes. For secondary school children the Clothing and the Mobility basket without car would be in the third position representing around 11%. The cost of the latter basket is higher for secondary school children because of the fact that the Public Transportation System in Barcelona provides special price only for children between 4 and 13 years of age (a card 35 Euros card in 2014)<sup>43</sup>. Rest and Leisure and Maintaining Social Relationships are the baskets with less weight relative to the total budget. Personal and Health Care have also a lower weight in relation to the total budget for children due to the universal Health Care System, especially for primary school children. Regarding secondary school children, in our case 14 year-old girl, the personal care costs are higher because of the inclusion of specific products and contraceptives for females and dental care makes also increase the budget for health care.

In conclusion, without considering housing and car costs, the Healthy Food budget is the one that represents a higher share of the total budget in all family types. The weight of the other baskets depends on the household composition, mainly on the presence of children. The additional costs per child depend on the age and sex. We have observed that all costs increase with age, except for the Clothing basket. However, in the construction of the budgets we did not take into account some widespread practices of recycling within families such as “passing on clothes” or sharing school material (e.g. books) between siblings or cousins; these exchanges would be very difficult to estimate, but in real life can represent an important source of savings for parents. At the same time, some economies of scale emerge when the family grows. An example is seen in the 4-member family type where the Leisure basket cost is not doubled compared to the single parent with a secondary school child, because siblings could share a hotel bedroom during holidays. Nevertheless, the budgets we have estimated reveal that, for

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<sup>43</sup> As explained in the Mobility basket chapter the age range has been widened until 14 years old since 2016 and more recently in January 2017 the card changed its name to “T-16” and could be used by children until 16 years old for the same price (Generalitat de Catalunya, 2015; ATM, 2016).

some specific needs, the added costs for children have an important weight on the monthly budget for families.

Table 37. Total monthly budget (in Euros) without housing costs per various family types. Barcelona reference city, 2014.

Baskets	Single woman	Single man	Average single	Single woman + boy 10y	Single man + boy 10y	Average + boy 10y	Single woman + girl 14y	Single man + girl 14y	Average single + girl 14y	Couple	Couple+boy 10y	Couple+girl 14y	Couple+boy 10y+girl 14y
Healthy food & kitchen equipment	138,47	179,78	159,13	265,32	312,64	288,98	276,10	316,11	296,11	302,45	441,61	445,17	570,24
Suitable clothing	47,23	51,53	49,38	104,97	109,27	107,12	98,52	102,81	100,67	92,29	149,68	143,22	201,13
Rest & leisure	52,00	52,52	52,26	65,66	66,26	65,96	83,97	84,47	84,22	68,91	82,75	100,96	107,08
Personal & health care	45,50	28,99	37,24	62,38	45,87	54,12	87,08	70,58	78,83	72,23	89,11	113,77	130,47
Maintaining significant social relations	88,81	89,72	89,27	108,05	109,61	108,83	114,34	115,66	115,00	119,43	142,10	148,17	169,69
Safety in childhood	0,00	0,00	0,00	100,62	100,62	100,62	112,78	112,78	112,78	0,00	103,87	116,03	213,41
Mobility (total public transport+bike)	50,07	50,90	50,49	57,32	58,15	57,74	99,25	100,09	99,67	100,98	108,22	150,16	157,41
Mobility (total public transport+bike+car)	266,06	266,89	266,47	273,30	274,14	273,72	315,24	316,07	315,66	316,96	324,21	366,14	373,39
Total (without car & housing costs)	422,09	453,45	437,77	764,33	802,43	783,38	872,05	902,50	887,28	756,28	1117,34	1217,48	1549,42
Total (without housing costs)	638,07	669,43	653,75	980,31	1018,41	999,37	1088,04	1118,49	1103,27	972,27	1333,33	1433,47	1765,41

Source: Based on Cussó *et al.* (2016). Note: Healthy food does not include bottled water.

Table 38. Weight of the various baskets relative to the total budget with/without car costs included (%). Barcelona reference city, 2014.

Baskets	Average single		Average single+boy 10y		Average single+girl 14y		Couple		Couple+boy 10y		Couple+girl 14y		Couple+boy 10y+girl 14y	
	Without car (%)	With car (%)	Without car (%)	With car (%)	Without car (%)	With car (%)	Without car (%)	With car (%)	Without car (%)	With car (%)	Without car (%)	With car (%)	Without car (%)	With car (%)
Healthy food	36,35	24,34	36,89	28,92	33,37	26,84	39,99	31,11	39,52	33,12	36,56	31,06	36,80	32,30
Suitable clothing	11,28	7,55	13,67	10,72	11,35	9,12	12,20	9,49	13,40	11,23	11,76	9,99	12,98	11,39
Rest & leisure	11,94	7,99	8,42	6,60	9,49	7,63	9,11	7,09	7,41	6,21	8,29	7,04	6,91	6,07
Personal & health care	8,51	5,70	6,91	5,42	8,88	7,15	9,55	7,43	7,98	6,68	9,34	7,94	8,42	7,39
Maintaining significant social relations	20,39	13,65	13,89	10,89	12,96	10,42	15,79	12,28	12,72	10,66	12,17	10,34	10,95	9,61
Safety in childhood	0,00	0,00	12,84	10,07	12,71	10,22	0,00	0,00	9,30	7,79	9,53	8,09	13,77	12,09
Mobility	11,53	40,76	7,37	27,39	11,23	28,61	13,35	32,60	9,69	24,32	12,33	25,54	10,16	21,15
Total (without housing costs)	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00	100,00

Source: Based on Cussó *et al.* (2016). Note: Healthy food does not include bottled water.

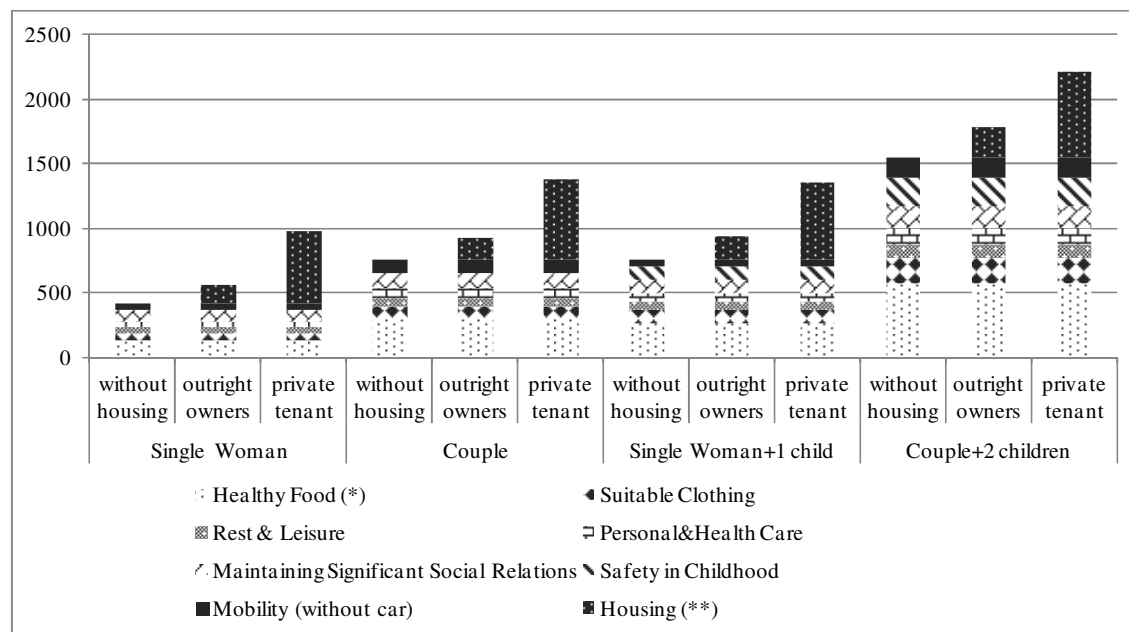


Table 39. Total monthly budget (in Euros) for children per basket and weight of the various baskets relative to the total children's budget excluding car and housing costs (%). Barcelona reference city, 2014.

Baskets	Primary school child (one parent) (€)	Primary school child (one parent) (% / total)	Secondary school child (one parent) (€)	Secondary school child (one parent) (% / total)	Primary & secondary school child (couple) (€)	Primary & secondary school child (couple) (% / total)
Healthy food	129,85	37,57	136,98	30,47	267,78	33,76
Suitable clothing	57,74	16,71	51,29	11,41	108,84	13,72
Rest & leisure	13,70	3,96	31,96	7,11	38,18	4,81
Personal & health care	16,88	4,88	41,59	9,25	58,24	7,34
Maintaining significant social relations	19,56	5,66	25,73	5,72	50,26	6,34
Safety in childhood	100,62	29,11	112,78	25,09	213,41	26,91
Mobility	7,25	2,10	49,18	10,94	56,43	7,11
Total (without car & housing costs)	345,61	100,00	449,51	100,00	793,14	100,00

Source: Based on Cussó *et al.* (2016). Note: Healthy food does not include bottled water. Additional costs derived using the average cost (man/woman) for single person household.

Figure 14. Total monthly budget (in Euros) with housing costs included by type of tenure per various family types. Barcelona reference city, 2014.



Source: Own computations, except for housing costs. (\*) Healthy food: does not include bottled water. (\*\*) Housing costs: EU-SILC UDB 2012 – version 2 of August 2014, updated to price levels for the first half of 2014, using the harmonised consumer price index for housing, water, electricity, gas and other fuels from Eurostat online database, see Goedemé *et al.* (2015a). This is data was provided by CSB-UA, the coordinating team of the ImPRovE project.

## **RESULTS STUDY 2: From reference budgets to poverty lines in Catalonia**

### **1. Introduction**

The detailed composition of the RBs developed for ten family types – using Barcelona as a reference city and contrasted for densely populated areas in Catalonia – has been presented in the previous chapters of this thesis. The budget reflects the minimal financial resources needed to reach a certain standard of living, which is defined as having an adequate social participation in our context. This means that people should be able to develop the social positions commonly agreed: ‘member of a family’, ‘friend’, ‘worker’, ‘student’ or ‘citizen’ among others. The budget obtained is illustrative for certain family types and is structured in ten intermediate needs and their functions to guarantee health and autonomy. At the same time, these functions are translated in ten baskets of goods and services based on the framework and methodology developed in Storms *et al.* (2013) starting from the theory of human needs of Doyal & Gough (1994).

Thus, the RBs here developed define what would be the minimum acceptable living standard taking into account state provided goods and services, as well as experientially-grounded knowledge from citizens. As poverty in the European context is understood as not having enough resources to develop the minimum acceptable way of life in a particular Member State, the budget approach has been positioned historically as an empirical perspective to set the poverty line (Decancq *et al.*, 2013; Storms, 2012; Van den Bosch, 2001). Particularly in the context of the Europe 2020 Strategy goals, RBs are seen as a potential approach to contextualise poverty indicators and monitor social policy, especially if developed from a cross-nationally comparable method. RBs are also regarded as an educative instrument for financial counselling, health advice or assessment of family and children needs (Goedemé *et al.*, 2015a; Penne *et al.*, 2016; Saunders, 2000; Vranken, 2010).

In this section, we explore how the reference budgets obtained for densely populated areas in Catalonia could be used to contextualise the at-risk-of-poverty indicator, which defines the poverty threshold at the 60% of the national median equivalised disposable income (Atkinson, Cantillon, Marlier & Nolan, 2002). In the

framework of the ImPRovE project and in collaboration with researchers at CSB-UA<sup>44</sup>, the ImPRovE reference budgets built from a cross-national comparative perspective have been adapted for the measurement of income adequacy. Afterwards, complementary poverty thresholds were developed for Belgium, Finland and Spain. To this end, we used the reference budget approach in order to contextualize the poverty line based on the at-risk-of-poverty indicator for different groups calculated using the EU-SILC for the year 2012 (Penne *et al.*, 2016). We will apply the procedure described in this previous work to Catalonia densely populated areas in order to estimate the number of people with a net disposable income below the reference budget and the at-risk-of-poverty thresholds, with a particular focus on households with children. Therefore, the aim is not to provide an alternative indicator to measure poverty, but to offer a different approach to poverty in our territory.

The chapter is structured in the following sections. First, the level of poverty in Catalonia is contextualised in relation to the European Member States using the at-risk-of-poverty indicator at the 60% of the national median equivalised disposable income (AROP60). Second, we present how the developed RBs are adapted as a poverty line. Finally, we estimate the AROP60 and the RBs indicators among various population groups: private tenants and owners; households with and without children and age groups (young, adults and elderly) using EU-SILC 2012<sup>45</sup>.

## **2. Contextualisation of the at-risk-of-poverty rate in Catalonia**

Spain has been one of the countries most affected by the recession in the last decade according to recent data by *Innocenti Reports Cards*. More precisely, the studies highlight that child poverty in Spain has consistently increased in the period 2008-2012 and that the number of children under the age of 17 living in jobless households has doubled (Centro de Investigaciones de UNICEF, 2014). Furthermore, in Spain the relative income gap exceeded the 60% in 2013 – this indicator is a measure of income

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<sup>44</sup> The research team at CSB-UA (Antwerp, Belgium) that developed this methodology was composed by Dr. Tim Goedemé, Dr. Bérénice Storms and Ms. Tess Penne. In order to learn and adapt the method to study poverty in Catalonia, I performed a 3-month internship at CSB-UA. We also collaborated with Mr. Lauri Mäkinen from the University of Turku (Finland). The results of this exercise are published in Penne *et al.* (2016).

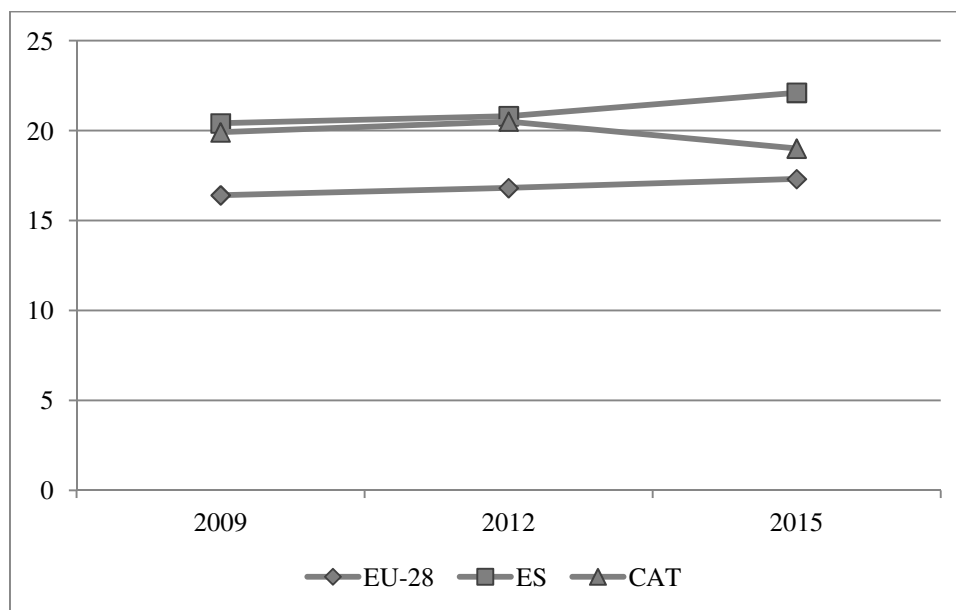
<sup>45</sup> The responsibility for all conclusions drawn from the EU-SILC data lies entirely with the author of this thesis.

inequality and shows how far a child at the 10<sup>th</sup> percentile is behind the average (UNICEF Office of Research, 2016:4).

In 2015 nearly one out of three adults (28,8%) and 34,4% minors were at risk of poverty or social exclusion in Spain according to the at-risk-of-poverty and social exclusion indicator (AROPE). The Spanish AROPE rate is consistently higher than the median AROPE for the overall population and for children under 18 years old in the 28 European Member States, which is estimated to be 23,7% and 26,9%, respectively (Eurostat, 2017a). The percentage of people at risk of poverty or social exclusion is also increasing in Catalonia, one of the wealthiest regions in Spain. Data from the Catalan Statistical Office for 2015 shows that 23,5% of the Catalan population and 31,7% of children less than 18 years old are at risk of poverty or social exclusion (Idescat, 2017f). These data is estimated using the regional median income level, which according to UNICEF is more adequate to approach child poverty and to give a better reference for local social policies (UNICEF, 2000 & 2007). The same source establishes the poverty threshold in Catalonia in 2014 at 9.667,30€ for a single person household and 20.301,30€ for household with 2 adults and 2 children, which means that the 19% of the total population was living under this threshold (Idescat, 2017c).

Figure 15 compares the evolution of the AROP60 indicator for Spain and Catalonia with the average of the 28 European Member States (EU-28). The AROP60 rates for Spain and Catalonia are around 20% and above the average of the EU-28 for all the period 2009-2015. Nevertheless, for Catalonia the rate decreases to 19%, approaching the average of the EU-28 (17,3%).

Figure 15. At-risk-of-poverty rate in Catalonia and Spain in comparison with the average of the 28 European Member States, years 2009, 2012 & 2015. Percentage of total population.

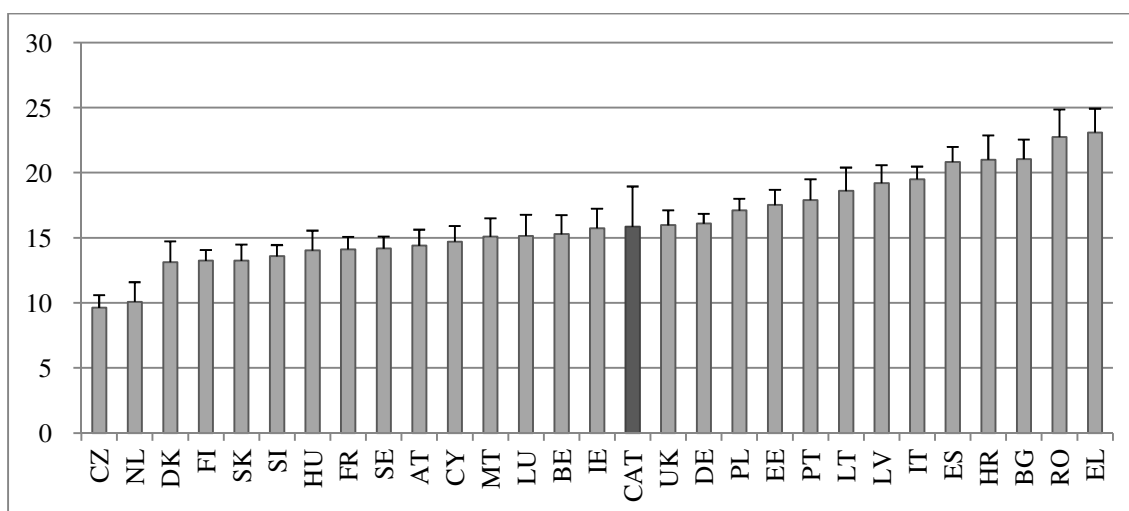


Source: Eurostat (2017b) & Idescat (2017a, 2017b, 2017c). Note: For the year 2009, the at-risk-of-poverty rate corresponds to EU-27. The rate for Catalonia was estimated using the regional median income level.

In Figure 16 we have situated the AROP60 for Catalonia in relation to the 28 European countries for the year 2012<sup>46</sup>. We have estimated that 15,8% of people in Catalonia were at-risk-of-poverty taking into account the national median income level, which is close to the average of the EU-28 countries: 16,8% (Eurostat, 2017b). Conversely, Spain had a higher poverty rate (20,8%) and was at the bottom of the EU-28 countries, close to Croatia and Bulgaria (21%). The countries with the lowest percentage of people at-risk-of-poverty were the Czech Republic (9,6%) and the Netherlands (10,1%), followed by Denmark and Finland, both around 13%.

<sup>46</sup> In order to construct the AROP60 rate a do-file prepared by Goedemé & Montaigne (2013) has been applied using STATA software.

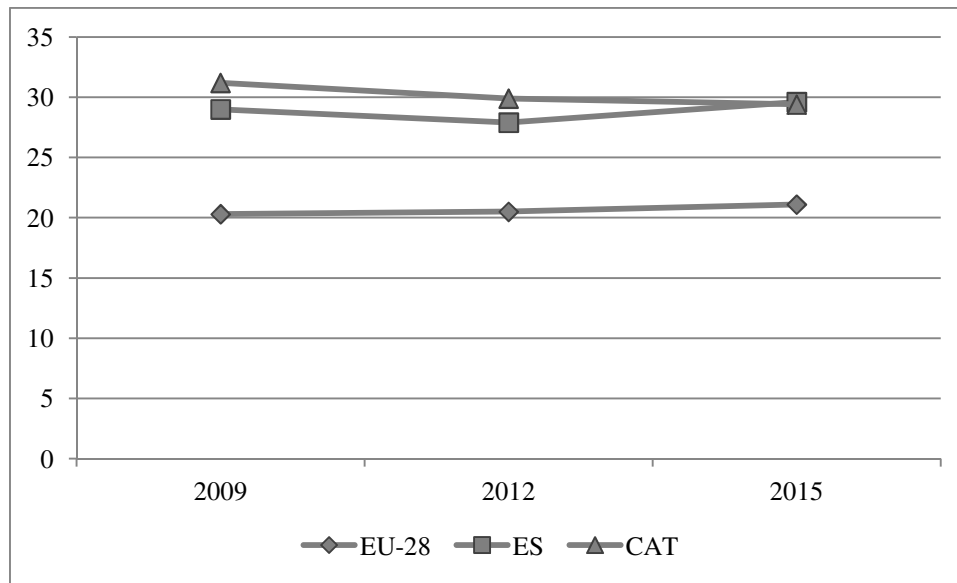
Figure 16. At-risk-of-poverty rate in the European Member States and Catalonia, 2012. Percentage of total population.



Source: Own computation. EU-SILC UDB 2012 – version 4 of January 2016. Note: Error bars represent 95% confidence intervals, taking sample design into account (Goedemé, 2013; Zardo-Trindade & Goedemé, 2016). For Catalonia the rate is estimated using the national median income level.

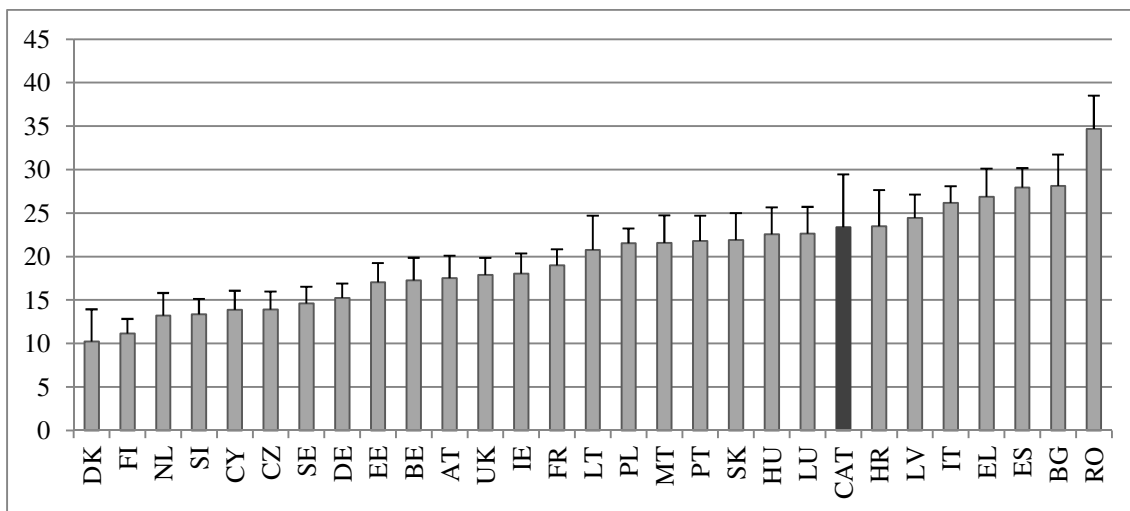
As we are interested in child poverty, in Figure 17 we focus our analysis on the evolution of the population younger than 18 years old (juvenile) at-risk-of-poverty threshold in Catalonia and Spain, compared to the average of the EU-28. This figure shows that the rate both for Catalonia and Spain (around 30%) is above the average of the EU-28 for all the period 2009-2015 (around 20-21%). In the case of Catalonia, the rate of juveniles at risk of poverty estimated through the regional median income slightly decreases during this period from 31,2% in 2009 to 29,4 in 2015, whereas in Spain the rate increases from 27,9% in 2012 to 29,6% in 2015. In 2012 people less than 18 years old at risk of poverty in Spain (27,9%) and Catalonia (23,4%) were at the bottom of the EU countries (see Figure 18), close to other Mediterranean countries such as Italy (26,2%) and Greece (26,9%) or Bulgaria (28,1%). According to this indicator, Nordic countries such as Denmark (10,2%) and Finland (11,1%) had the lowest rates.

Figure 17. Percentage of people under the age of 18 at-risk-of-poverty rate in Catalonia and Spain in comparison with the average of the 28 European Member States, years 2009, 2012 & 2015.



Source: Eurostat (2017b) & Idescat (2017d, 2017e). Note: For the year 2009, the at-risk-of-poverty rate corresponds to EU-27. For Catalonia the rate is estimated using the regional median income level.

Figure 18. Percentage of people under the age of 18 at-risk-of-poverty rate in the European Member States and Catalonia, 2012. (%).



Source: Own computation. EU-SILC UDB 2012 – version 4 of January 2016. Error bars represent 95% confidence intervals, taking sample design into account (Goedemé, 2013; Zardo-Trindade & Goedemé, 2016). For Catalonia the rate is estimated using the national median income level.



Although the AROP60 indicator is easy to calculate cross-nationally and is proved to be robust and statistically validated, its application as a sole measurement of poverty is controversial as mentioned in section the theoretical framework. Below we summarize some of the main limitations and how the RBs approach could contribute to complement this indicator.

First, AROP60 establishes a standard of living by choosing an arbitrary point on the income distribution, which is more closely related to income inequality than to the standard of living. For example, it is possible that in a period of economic growth AROP60 rate does not decrease, although there is improvement of lower incomes (Borgeraas & Brusdal, 2008; Storms, 2012). Particularly, in the case of Catalonia, we observe that the threshold varies if we use the national or the regional median income as a reference to estimate the AROP60. By contrast, RBs are less relativistic and construct a standard of living which is defined locally at a given time.

Second, AROP60 is an indicator only based on cash income (Decancq *et al.*, 2013; Storms *et al.*, 2011). Conversely, the RBs take into account the income in kind and state available goods and services. Thus, it is estimated the “real” out-of-pocket expenses that is necessary for families independently of income evolution (Goedemé & Rottiers, 2011; Storms *et al.*, 2011).

Third, in order to take into account economies of scale – the additional weight of each member in a household – and make the incomes comparable across households in terms of living standards, the disposable household income is equivalised using the modified OECD equivalence scale. This scale assigns a value 1 for the first adult, 0,5 to each adult or children aged 14 or over and 0,3 to children below 14 in the household (Atkinson *et al.*, 2002). Then the disposable household incomes are divided by the equivalent household size. In the AROP60 indicator these equivalence scales are the same across countries. However, as the provision of state goods and services is not taken into account, these equivalence scales could be underestimated when people in some countries have to face circumstances such as additional medical expenses or education costs. Thus, RBs illustrate better the variation of needs across households and, particularly, assess children costs (Borgeraas & Dahl 2010; Storms *et al.*, 2011). A last remark with concerning AROP60 could be the limited impact of the relative poverty approach on policy (Bradshaw *et al.*, 1987). Contrarily, RBs developed form a needs-

based perspective could offer valuable information on different social policy fields for an inclusive society, such as improve accessibility to state provided goods and services, to assess adequacy of social benefits or promote people skills and competences for social participation (Storms, 2012).

### **3. Translation of the RBs to poverty lines**

The RBs have been built for a certain number of family types, while the conditions and the characteristics of the population are much more heterogeneous. Thus, the RBs developed and contrasted for densely populated areas in Catalonia were adapted according to the methodology and assumptions made in the ImPRovE project by Penne *et al.* (2016) based on the following procedures:

First, the RBs were converted to 2011 prices since EU-SILC 2012 include reference incomes of that year. In order to make this adjustment and, as the majority of the baskets of goods and services were priced in the first half of 2014, we took the regional consumer price index and use the ratio of the average of the first semester in 2014 (first 6 months) divided by the average of the year in 2011. The ratio obtained for Catalonia region in this period was 1,048 (INE, 2016c). Therefore, the total budget for each family type was divided by this ratio to obtain the budget indexed to 2011 price level. Finally, if the average budget for a single man-woman was estimated at 438€/month for the year 2014 (see Study 1, Table 37), the indexed budget to 2011 price levels would be 418€/month. This amount would be the reference base line to set the poverty threshold without housing costs.

Second, equivalence scales at the level of reference budgets are calculated in order to extrapolate the RBs built for specific family types to the whole population. This involves: first, obtain the added costs of an adult and children in a household using the deductive variant method. Afterwards, divide this amount by the budget of a single person household. In this case, we took the average amount between man and woman, as shown in Tables 39 and 40 (in section 12.1, Study 1).

As commented in section 12.2 of Study 1, the exercise brought steep equivalence scales without housing costs: 1 (first adult, 18 years old or over); 0,73 (second adult); 0,75 (primary school child, from 6 to 11 years old) and 0,99 (secondary school child, from 12 to 17 years old). Because of the fact that the RBs are only

developed for adults in active age and children of 10 years old and 14 years old we had to make certain assumptions in order to generalise the scales to the whole population. Based on the premises in the previous work (Penne *et al.*, 2016) we assumed that: (1) the additional cost of children less than 6 years is 2/3 the cost of a primary school child, so the equivalence scale is equal to 0,5; (2) students (from 18 to 25 years old) are assigned with the same budget as single persons, with an equivalence scale equal to 1, which means that the additional cost is higher than a secondary school child. Therefore, the reference budget will double when a student is added to a single adult household; (3) the cost of a second adult is assigned to all people of 18 years old or over and not studying.

In this case, variables such as the working status or the sex of the person are not taken into account and neither is the health situation. In this way, we guarantee that the results will be comparable with the previous research for the other countries Penne *et al.* (2016). However, it should be stressed that people in bad health situation will need higher resources to achieve the same standard of living. Therefore, probably the generalisation of the developed RBs for the whole population will result in an underestimation of poverty, particularly for some groups with specific needs that have not been taken into account while developing the RBs.

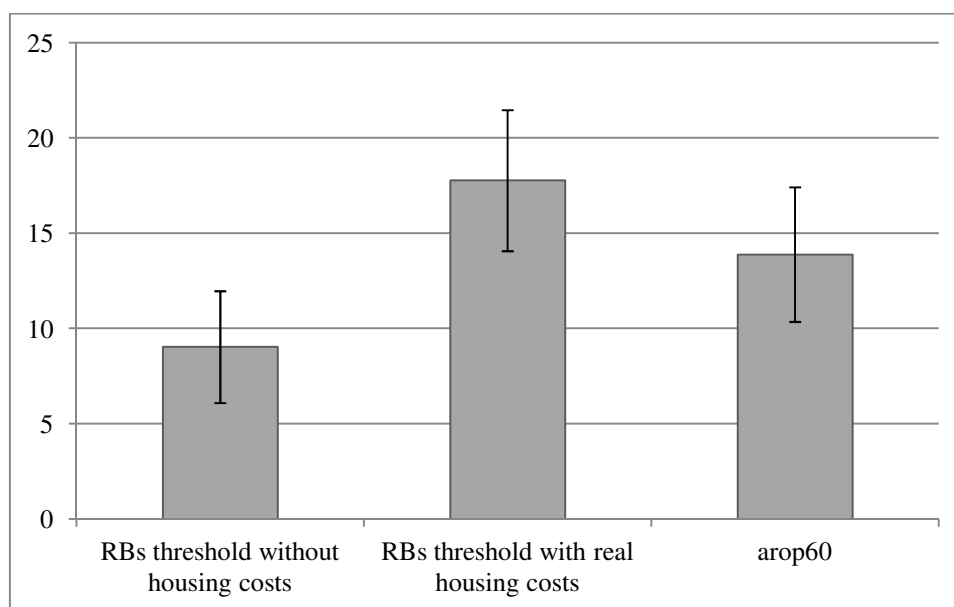
Third, by multiplying the reference base line previously defined by the equivalence scales without housing costs, the budget is extrapolated to the whole population living in densely populated areas in Catalonia by means of EU-SILC. The result is an assigned reference budget without housing costs for each household in the sample, which will be understood as the threshold for an adequate social participation without housing costs. Then, the real housing costs are added to this threshold using the variable hh070 available at EU-SILC, which includes the amount of the monthly rent or mortgage, the utility costs and other housing taxes. In this case, the real housing costs do not reflect the quality conditions of the dwelling. Thus, people with high housing costs could be identified as poor while living in an adequate dwelling. To decrease the impact of this factor, the housing costs were top-coded at the 99<sup>th</sup> percentile following the criteria in Penne *et al.* (2016).

In summary, the procedure described in this section allows to calculate the number of people in Catalonia densely populated areas that can be identified as “poor” because they have a non-equivalised income below the established thresholds (with and without housing costs). In the next section, the results are presented and compared with the AROP60 indicator for different population groups.

#### 4. Comparison poverty thresholds: RBs vs. AROP60

In Catalonia 63,1% of the population in 2012 lived in densely populated areas, according to our estimations by means of EU-SILC. In the Figure 19 below we observe that a higher percentage of people do not have sufficient resources for adequate social participation when housing costs are taken into account according to the RBs indicator. More precisely, 17,8% of the total population living in these areas. In other words, there is a higher proportion of people with inadequate income to achieve the level of RBs. However, without including real housing costs, the number of people having insufficient resources decreases in this territory (9%). When using the AROP60 rate 13,9% of people would be considered living in poverty<sup>47</sup>.

Figure 19. Percentage of people living in a household with net disposable income below the RB threshold or at-risk-of poverty threshold in densely populated areas in Catalonia, 2012.



Source: Own computation. EU-SILC UDB 2012 – version 4 of January 2016. Note: Error bars represent 95% confidence intervals, taking sample design into account (Goedemé, 2013; Zardo-Trindade & Goedemé, 2016).

<sup>47</sup> In this section AROP60 for Catalonia is estimated using the Spanish threshold at 60% of disposable equivalised household national median income, as Catalonia is considered a subsample of Spain within EU-SILC.

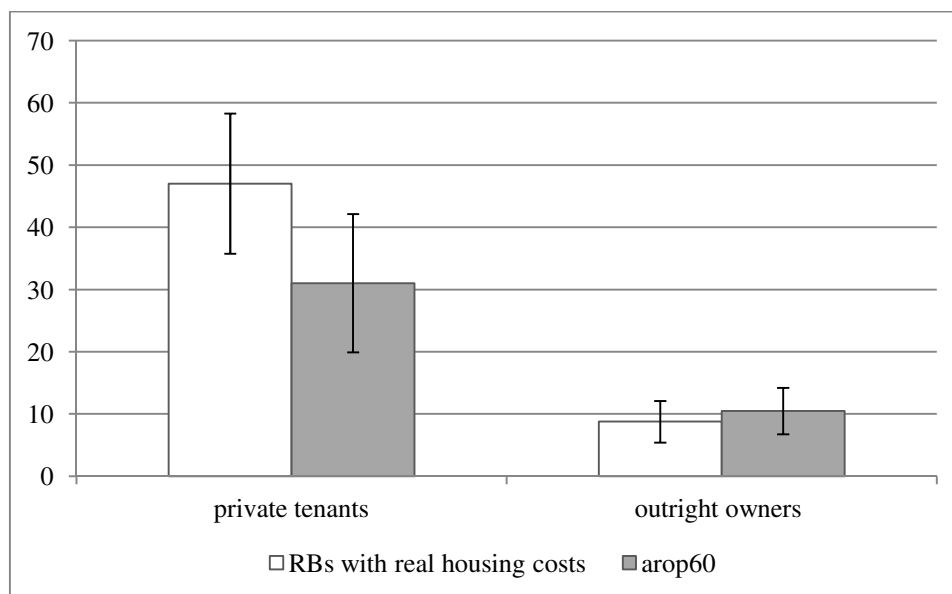
Concerning housing costs, in chapter 12.1 (Study 1) we have highlighted the relative weight of housing costs when added to the total budget. Particularly for private tenants it was estimated that the costs for an adequate dwelling represented between 56% to around 30% of the total budget without car depending on the household type, while for owners these costs were lower. Ownership is the main option among Catalans to access housing. In the EU-SILC sample for 2012 only 18,1% were private tenants, while 39,1% and 34,5% were outright owners or owners paying mortgage, respectively. The percentage of people who paid reduced rent was very low, 8,28%. The mean for real housing costs was 677,90 Euros/month for private tenants and 217,75 Euros/month for outright owners. In the next Figure 20 it is observed that when real housing costs are included both indicators identify private tenants as the group with the highest level of poverty in Catalonia densely populated areas.

In the case of the RBs indicator 47% of private tenants and 8,8% of outright owners will have a net disposable household income below the threshold. When measured through the at-risk-of-poverty threshold, the proportion of people below the threshold is estimated at 31% for tenants and 10,5% for private owners. The difference between tenants and owners is larger in the case of the RBs indicator, but the difference between the groups is significant between these two groups in both indicators ( $p < 0,001$  for RBs and  $p = 0.001$  for  $arop60$ , two tailed t-test)<sup>48</sup>. Therefore, private tenants will need more resources to fully participate in the society, particularly, due to high rent amounts in the private market in our context (Bosch, 2011 & Bosch-Meda, 2014).

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<sup>48</sup> The significant level is calculated using a t-test by means of STATA software, which compares the means of one variable between two groups. By conventional criteria the difference is considered to be statistically significant when p value is equal or smaller than 0,05 (Bardina *et al.*, 2005).

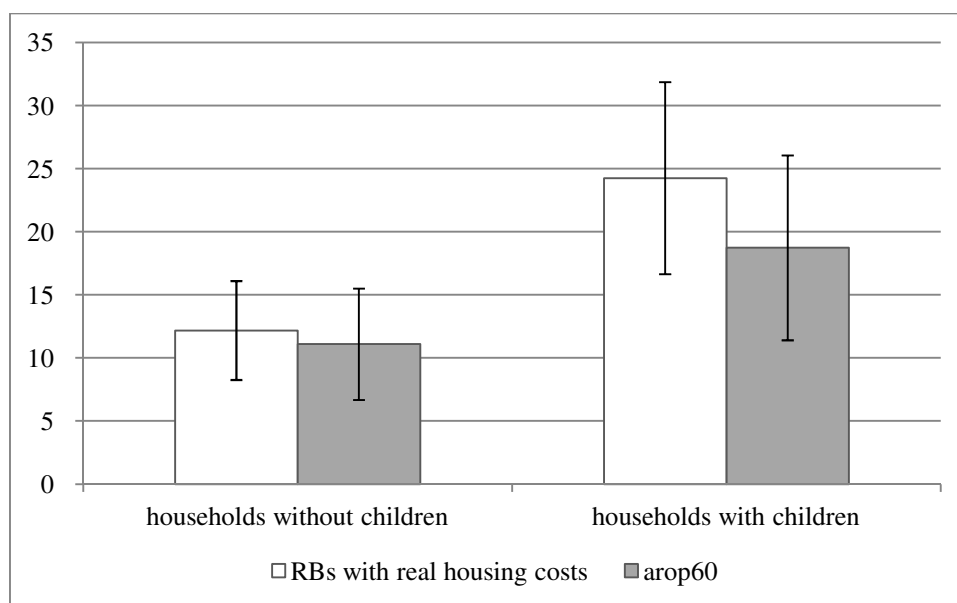
Figure 20. Percentage of people with a net disposable income below the thresholds for tenure status in densely populated areas in Catalonia, 2012.



Source: Own computation. EU-SILC UDB 2012 – version 4 of January 2016. Note: Error bars represent 95% confidence intervals, taking sample design into account (Goedemé, 2013; Zardo-Trindade & Goedemé, 2016).

In the next paragraphs we describe the estimation of people with a net disposable income below the RBs or the AROP60 thresholds by household type and age groups. In the case of household types the sample was divided in two groups: households without children (46,8%) and households with children (27,8%). Households with children are identified by both indicators as those with the highest levels of poverty in densely populated areas in Catalonia. According to the RBs indicator 24,2% of people living in households with children are estimated to have insufficient resources for adequate social participation, while when measured through the at-risk-of-poverty threshold the proportion of people below the threshold is 18,73%. Differences between households with and without children are only significant for the RBs indicator ( $p = 0.004$ , two-tailed t-test). For singles or couples without children the estimated poverty rate is 12,2% for RBs and 11,1% for AROP60.

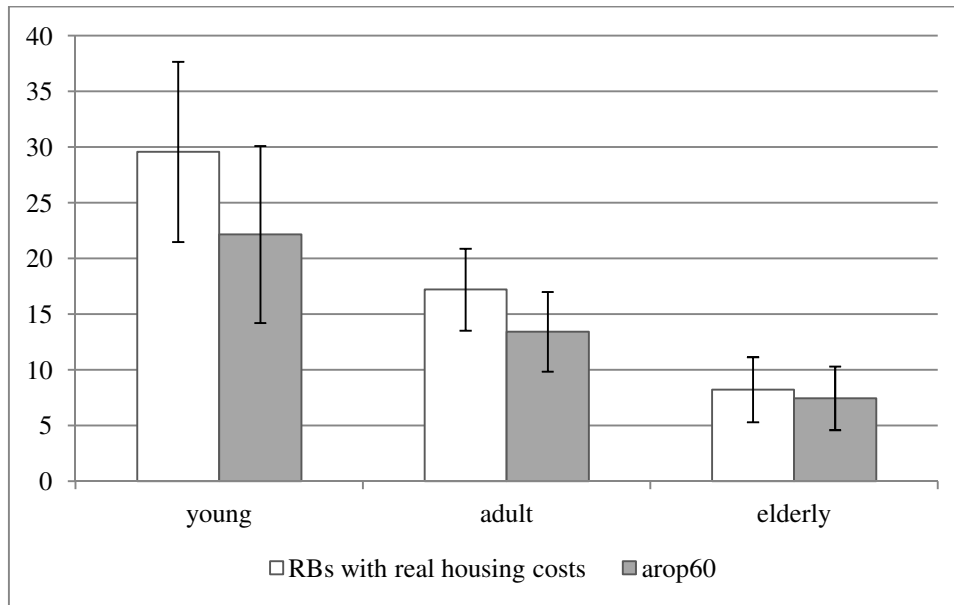
Figure 21. Percentage of people with a net disposable income below the thresholds for different household types in densely populated areas in Catalonia, 2012.



Source: Own computation. EU-SILC UDB 2012 – version 4 of January 2016. Notes: Error bars represent 95% confidence intervals, taking sample design into account (Goedemé, 2013; Zardo-Trindade & Goedemé, 2016). Households without children: singles and couples; Households with children: single parents and couples with 1 child, 2 children or 3 or more children.

In the last Figure 22 we show the percentage of people with a net disposable household income below the RBs or the AROP60 threshold for different age groups. The population in the sample was divided in three groups: young (less 18 years old, 19%); adults (between 18 and 64 years old, 64,5%); elderly (65 year old or over, 16,5%). Both indicators identify people less than 18 years old as the group more vulnerable to poverty in Catalonia densely populated areas: 28,6% and 22,2% according to the RBs indicator or the AROP60, respectively. Of note, elderly people (8% as estimated in both indicators) are the group with the lowest level of poverty. Differences between age groups are significant in both indicators ( $p < 0.01$ , two tailed t-test).

Figure 22. Percentage of people with a net disposable income below the thresholds for age groups in densely populated areas in Catalonia, 2012.



Source: Own computation. EU-SILC UDB 2012 – version 4 of January 2016. Notes: Error bars represent 95% confidence intervals, taking sample design into account (Goedemé, 2013; Zardo-Trindade & Goedemé, 2016).

To sum up, in this section we have shown that the difference between tenants and owners, families with and without children, as well as between age groups is larger in the case of the RBs indicator compared to the AROP60. Nonetheless, both indicators identify the same groups at risk: private tenants, households with children, and people less than 18 years old.

Overall, in this chapter we have explored how the reference budgets obtained for Catalonia densely populated areas can be used to contextualise the at-risk-of-poverty indicator following the methodology proposed in Penne *et al.* (2016). The poverty figures calculated using the RBs approach by means of EU-SILC data provide a complementary indicator of the at-risk-of-poverty threshold. The AROP60 indicator fixes an arbitrary threshold, which changes according to the evolution of the median income in a particular country. We have observed that the latter threshold is really variable in the case of Catalonia depending on whether the estimation is based on the national or regional median income. Therefore, the RBs indicator reflects from a needs-based perspective a local standard of living for a decent life, independently of income and consumption patterns.



## **PART V: DISCUSSIÓ / DISCUSSION**

The detailed composition of the baskets of goods and services and the total budget for ten family types were presented in the previous chapters. Complementary poverty threshold using the RBs has also been explored for densely populated areas in Catalonia, which brings new ways to approach child poverty.

Thus, the RBs are not meant to be prescriptive of what should people do or have, but to illustrate the minimum financial resources required to develop the social positions in a thoroughly-described family type in a particular society, independently from the availability of personal resources or consumption patterns (Goedemé *et al.*, 2015a; Saunders, 2000). In that sense, RBs are a tool to guide social policies and, specially, policies for children, in planning and orientating the needs that require more resources to guarantee the well-being of children and their families, as well as the equity between citizens.

The research questions in this dissertation were:

1. *‘Could we find a social consensus about the minimum acceptable level of resources required for families to adequately participate in densely populated areas in Catalonia?’*
2. *‘What is the minimum budget for families with children to develop an adequate social participation in densely populated areas in Catalonia?’*
3. *‘How the reference budgets could be a complementary approach to contextualise at-risk-of poverty indicator in densely populated areas in Catalonia?’*

In this chapter<sup>49</sup> we discuss the results obtained trying to answer the above questions, as well as relating the outcomes to other research in the same field and pointing out some strengths and limitations of our approach.

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<sup>49</sup> This chapter is partly based on Cussó *et al.* (2016).

## Question 1

*‘Could we find a social consensus about the minimum acceptable level of resources required for families with children to adequately participate in densely populated areas in Catalonia?’*

This question was developed in Study 1 with the help of focus groups discussions with children and adults in two rounds. First, 3 groups within the ImPRovE project (2014) and 7 additional focus groups in 2016. In total 44 adults and 29 children from different backgrounds were interviewed using focus groups of 5 to 10 people in Barcelona, AMB and other densely populated areas in Catalonia. Although we cannot take this sample as representative for our society, the deep analysis of the arguments of the participants through NVIVO programme has brought a broader social consensus.

### *Social positions*

The Table 41 summarizes the common list of social positions obtained from the discussions. Twenty social positions divided in five spheres of participation were of common consensus for adults, while for children we obtained fourteen common social positions that have been organized in four spheres. We can observe that participants identified the same social positions in the social sphere both for adults and children. In the family sphere and active citizenship some coincidences can be seen. In terms of number of references obtained throughout the qualitative analysis the family and social spheres are the ones with more citations both for adults and children (see Tables 15 & 17 in section 2.1, Study 1). This could be interpreted as the positions included in both spheres are considered very important to have an adequate social participation. Therefore, the reference budgets should include the minimum necessary financial resources to be able to develop these social positions. In this case, the content of the Leisure, the Maintaining Significant Social Relations and the Safety in Childhood baskets would be particularly linked to these social positions identified in both spheres. A part from the social positions presented in this table, other social positions were mentioned in the focus groups, but were not finally selected for the core list because there was not sufficient consensus in the analysis, such as ‘being member of a religious community’ or ‘patients’ both for children and adults (see section 2.1, Study 1).

This common list of main social positions that adults and children should develop in densely populated areas in Catalonia could be compared to previous studies about this subject. Concretely, all the positions obtained in this exercise were also agreed in the focus groups with adults in Madrid city within the framework of the research *Pilot Project for the development of a common methodology on reference budgets in Europe* (Carrillo, Pintó, Cussó & Riera, 2016b). The European project concludes, taking into account the overall results, that ‘being a friend’, ‘neighbours’, ‘volunteer’, ‘consumer’, ‘caregiver’ were positions added to the pre-defined list in many countries (Goedemé *et al.*, 2015b), categories which have been also identified in the Catalan context, both for adults and children. Thus, the minimum goods and services included in the reference budgets should guarantee the development of these positions.

Table 41. Summary of common social positions for adults in working age and children (10 - 14 years old) identified and agreed in focus groups, 2016.

Adults	Children
Family sphere	Family sphere
Father/Mother Son/daughter Siblings Partners Uncles/Aunts Caregivers Educators	Son/daughter Grandchild Siblings Cousins Nephews/Nieces
Labour sphere	Labour sphere
Worker Member of a trade union Employer Co-workers	
Social sphere	Social sphere
Neighbours Friends Consumers Sports-man / Sports-woman	Neighbours Friends Consumers Sports-boy / Sports-girl
Education sphere	Education sphere
Students	Pupils / Students Classmates
Active Citizenship sphere	Active Citizenship sphere
Members of an association/club Citizens Volunteers Members of a political party	Members of an association/club Citizens Volunteers

Source: Own data.

### *Intermediate needs*

As presented in section 2.2 (Study 1), the participants in focus groups agreed on the ten intermediate needs to be included to develop the reference budgets: (1) Healthy food; (2) Suitable Clothing; (3) Rest; (4) Leisure; (5) Personal hygiene; (6) Accessible healthcare; (7) Meaningful Social Relations; (8) Safety in Childhood; (9) Mobility and (10) Adequate Housing.

Throughout the discussions these needs were fully discussed and justified by participants. Other needs were also identified by participants: Security, Life Long Learning, Work and Time. The first two are also integrated in the theory of human needs to reach autonomy (Doyal & Gough, 1994). Nowadays, and particularly when living in an urban environment, goods and services related to security, such as insurances, are needed to guarantee a safe environment to protect ourselves physically and financially, especially, when living in a community. Additionally, our society demands constant update, so learning is an essential process to develop autonomy as an individual in this context. However, these needs depend on a lot of circumstances. Many assumptions should be made to standardize the goods and services for the fulfillment of both needs, as well as further discussion in focus groups would be required. For these reasons it has not been developed in this research. Time was only mentioned in one focus group and was mainly linked to the social position of ‘being a parent’, understood as an immaterial resource. Nevertheless, not for being immaterial is less important. As Mullainathan & Shafir (2014) point out that any type of scarcity, including money, time or limited friends, could contribute to limit people’s cognitive capacities. ‘Work’ was understood as a basic right and need for the development of autonomy in our society in focus groups, as it is also recognised in the *Spanish Constitution* (art.35.1).

This common social consensus coincides with previous research done in capital cities in Europe within the *Pilot Project for the development of a common methodology on reference budgets in Europe* (Goedemé *et al.*, 2015b). In this research many countries added the need of ‘decent work’. Also the need of ‘a job’ appeared in focus groups we held in Madrid within the European project mentioned above (Carrillo *et al.*, 2016b). In this way and, following the criteria established in the ImPRovE project, the reference budgets developed for densely populated areas in Catalonia, reflect the

minimum acceptable level of resources required to adequately participate either for working and non-working people.

#### *Activities, goods and services*

The budgets developed for Barcelona for four different family types within the ImPRovE project had the purpose to be cross-nationally comparable with six European cities which meant that all countries had to agree on a common theoretical and methodological framework in order to fulfil the goal proposed. Because of this requirement, the same procedures have been applied to all countries starting from a common basket of goods and services based on Belgian previous research on reference budgets (Storms, 2012). This decision could have had some effects on the final budgets, such as underestimate relevant differences in the national contexts, as the coordinating team pointed out in the comparative paper (Goedemé *et al.*, 2015a).

In our case, as there was no previous experience on constructing reference budgets from a normative approach in our territory, the common basket as a starting point has helped to develop the exercise more rigorously. This forced us to transparently document the decisions through guidelines, expert advice, scientific literature, survey data and three focus groups to justify the deviations from the common basket and adapt the baskets locally. Nevertheless, three focus groups were considered insufficient to comment all the content of the baskets, especially for those needs where guidelines were lacking.

In order to expand this approach for our territory, in this thesis we contrasted the reference budgets already developed for Barcelona for densely populated areas in Catalonia throughout the organisation of seven additional focus groups with adults and children. This has enabled us to find a major consensus on the activities, goods and services included in the baskets, which was necessary to see the appropriateness for this area, as well as to expand the budgets for ten family types. Particularly, to adapt the budget for single parents plus a 14 year old girl and couples with one child (a 10 year old boy or a 14 year old girl) as these profiles were not developed in the previous project and were necessary in the second part of the project to develop poverty thresholds based on reference budgets.

Furthermore, as shown in Table 23 in section 2.2 (Study 1) and also through the presentation of the different baskets (in sections 3 to 12, Study 1), this analysis has brought more information on how the variables that define the reference family type influence the content of the baskets: working status, place of residence, age, sex and health. According to focus groups participants the variable 'age' is associated with different activities, goods and services, and so it is one of the main factors that determine the composition of nearly all baskets, as well as the costs. As other research has concluded the age and sex combinations influence the final cost of the budgets, especially for children (Oldfield & Bradshaw, 2011; Parker, 1998; Saunders, 2000; Storms & Van den Bosch, 2009). The place of residence also appeared to be a variable to be taken into account for the goods and services included in the Healthy Food (e.g. physical activity), Safety in Childhood (e.g. day trip) or Mobility (e.g. private transport).

In this research reference budgets are illustrative and cannot be extrapolated to the whole population because they were developed for a limited number of thoroughly - described hypothetical family types composed with primary and secondary school children and adults in working age (30-50 years old) in good health and living in urban environments, following the criteria established in the ImPRovE project (Storms *et al.*, 2013). Therefore, if reference budgets are to be used for policy making a further effort to take into account a greater variation of reference situations would be necessary. This includes other age profiles such as toddlers and the elderly, or different health conditions of the target population, as well as rural environments.

### *State provided goods and services and purchasing patterns*

The developed reference budgets take into account income in-kind and so, which goods and services are provided free of charge or at low cost by the government. In this way, the “real” out-of-pocket expenses that are necessary for families to reach a given standard of living is reflected. The RBs built from this approach is seen as an advantage while using it to contextualise poverty, compared to the at-risk-of-poverty indicator that is only based on cash income. The at-risk-of-poverty indicator is cross-nationally comparable and identifies people living under the 60% of the national median equivalised disposable income after social transfers as those living in poverty. However, this rate could underestimate poverty in a country with limited access to goods and services provided by the state, as people having the same income level will need more resources to reach the same standard of living as families with the same income level in another country where these provisions are available (Storms *et al.*, 2011).

In the case of Spain, Public Health Care and Education expenditure accounts for a significant reduction of inequality and poverty in all regions (Jurado, Pérez-Mayo & Pedraja, 2016). Nevertheless, other authors have observed that the Spanish Welfare System – like other Welfare-System in Mediterranean countries – has a low expenditure in policies to support families with children, particularly with cash income benefits and benefits in kind (e.g. child care services). This characteristic has been observed before and after the beginning of the economic crisis, which affects children’s well-being and poverty rates; of note, Spain is already positioned at the queue of European Union countries regarding poverty (Bradshaw, 2014; Cantó, 2014; Förter & Verbist, 2014). In 2011, cash income benefits to families with children in Spain was 0,5% in terms of percentage of the Gross Domestic Product (GDP), clearly below the medium value of other European countries 1,4% (González-Bueno & Bello, 2014:38). In contrast to other neighbour European countries, a universal cash benefit for each child that was born or adopted only was implemented for a short period 2007-2010, although it is a key element to reduce child poverty (Cantó, 2014). A recent study by Save the Children shows that 45% of children in Catalonia are beneficiaries of some type of cash benefit, but the major part of these benefits (31%) are assigned to other members of the family (e.g. unemployed adults or retired people) and only 14% are exclusively for children. Therefore, the report estimates that this has little impact on reducing inequality (Masgoret, 2017:9-10).



The economic crisis and the subsequent implementation of austerity policies have restricted the provision of subsidized goods and services. In 2013 the investment in child policies in Spain was 7,6% less than in 2007, before the starting of the economic crisis. In the case of Catalonia, it was one of the regions with the highest investment in 2007. However, the study by UNICEF highlights that the investment has been reduced by 15% in this period (González Gago (dir.), 2015:23-25).

The participants in focus groups have contributed to identify which goods and services are state provided. In Catalonia health care services are free of charge and universal and compulsory education is also provided free of charge for children from 6 to 16 years of age. There are also some subsidized policies in the case of public transport. As it has been shown in sections 12.1 and 12.2 (Study 1) this institutional context clearly reduces the out-of-pocket expenses that parents should have for these services for their children. However, this is not the case of education, because there are some additional expenses not fully covered by the government. In what follows, we comment on each of these services as the economic crisis has affected these policies.

The investment in education has been reduced in nearly all regions of Spain between 2007 and 2013. Concretely, in Catalonia it was reduced 11,1% in this period (Assiego & Ubrich, 2015:41). This means that support to students such as grants to enroll and for school material (e.g. text books) has been reduced due to public budget shrinkage. In addition, there are important differences across Spain regarding the provision of school meals or textbooks (Assiego & Ubrich, 2015; Defensor del Pueblo, 2013).

According to the Spanish Household Budget data the average expenditure on education by Catalan households was 553,68 €/ year, i.e. 46,14€/month in 2014 (INE, 2017). As the developed RBs have shown the budget for education represents the largest share of the Safety in Childhood basket, that has been estimated around 42 Euros per month/child. Particularly, for couples plus two children this basket represents the second most important share of the total budget without housing and car costs. These costs have been called the 'hidden costs of education' in our context (Rodríguez Bartolomé & Escorial Senante, 2013). Thus, these austerity policies not only affect family economy, but also the equity and inclusion in the educative system that is

necessary to guarantee equal opportunities to access to knowledge and develop competencies for all citizens.

The universal coverage of the Spanish Health Care System has also been questioned during this period of austerity. The *Real Decreto-Ley 16/2012* reforms the access of foreigners to health care, increases the financial contributions to the health care services that are considered supplementary and for some medicines co-payment proportional to income level is required (Carvalho Fortes *et al.*, 2015). Still in 2015 a high level of satisfaction with health care services, including doctors and hospitals was obtained in Barcelona, around 65% of respondents said they were very satisfied or rather satisfied with these services, which was a result close to the average of the European cities analysed in the report *Quality of life in European cities* (European Commission, 2016:32). However, these recent changes could particularly affect the most vulnerable collectives, such as the non-registered foreigners and elderly people, highly dependent on these services.

Participants in our focus groups agreed that people could rely on Public Health Care Services and so, an additional budget to contract a health insurance was not considered necessary in a minimum budget for an adequate social participation. In our research, RBs have been constructed for family types composed by members that are in good health and well-informed people in working age. Nonetheless, when developing the Health Care basket for other family types the impact of these variations should be taken into account, not only Health Care cost might increase, but also the goods and services required to fulfill the other needs in order to achieve the same standard of living (Hill, Davis, Hirsch, Padley & Smith, 2015).

In the case of public transport the fares have not changed in the past two years. What is more for children tickets, the age range has been widened from 13 years old in 2014 to 16 years old in 2017 (Generalitat de Catalunya, 2015; ATM, 2016). The same applies for some cultural activities included in the Safety in Childhood basket that tend to be free or with discounts for children, generally under the age of 16. These types of policies clearly reduce children spending in big cities, while other costs are higher, for instance housing or child care, as noted in a study of the extra costs of children in London (Hirsch, 2015). However, it is necessary to make the age range a more coherent criterion between services, especially, knowing that in Spain compulsory education is

until the age of 16, when children acquire the right to work, and people reach adulthood at the age of 18. In that sense, to guarantee the mobility need is key, because as Ridge (2011) points out the accessibility to public transport is essential for social and cultural participation of children. In Barcelona 75% of the respondents in the survey *Quality of life in European cities* were satisfied with the public transport (bus, tram, underground) in the city, a result aligned with other European cities. The satisfaction has increased between 2013 and 2015 (European Commission, 2016:25). The report does not collect data on Barcelona Metropolitan Area. Nevertheless, participants in focus groups in our research said that a car is necessary to cover the mobility need outside Barcelona and its Metropolitan Area.

Finally, regarding other goods and services that compose the other baskets the market choice was the best option to access these resources at an affordable price, particularly supermarkets chains for the Healthy Food basket and Personal care. Hence, the information from focus groups has been of great importance to assess the purchasing patterns in our context and so determine the pricing procedure for each basket. The second round of focus groups has confirmed these patterns also for densely populated areas in Catalonia.

## Question 2

***‘What is the minimum budget for families with children to develop an adequate social participation in densely populated areas in Catalonia?’***

The total budget for ten thoroughly-described family types and the additional expenses that children represent in a household obtained using the RBs approach developed within the ImPRovE project for Barcelona as a reference city and contrasted with densely populated areas in Catalonia have been presented in sections 12.1 and 12.2 (Study1). The lowest monthly reference budget is 422€ for a single woman, while the highest budget is 1549€ for a household composed of a couple with two children (10 year-old boy and 14 year-old girl) without housing and car costs. If we update the budgets using the consumer price index for the year 2016 the results are quite similar from 420€ to 1542€ for the same family types, respectively<sup>50</sup>.

The variability on the total budget is mainly explained by the number of adults included in the family types, the number of children and their age. Additionally, the inclusion of housing costs, private transport and child care are elements that influence the total budget, as other research has highlighted (Bradshaw *et al.*, 2008; Goedemé *et al.*, 20015a; Storms & Van den Bosch, 2009). We have observed that the additional cost for a child in a single person household is higher than the one for an adult in the same type of household. For bigger families this additional cost decreases, which is explained by the role of economies of scale. This is particularly true for the Housing basket, while few economies of scale are observed in the Healthy Food basket.

In this section we have tried to compare our estimations with other international and national research in the field. First, a contextualisation of our results contrasted with those of other cities in the framework of the ImPRovE and *Pilot Project for the development of a common methodology on reference budgets in Europe* projects (Goedemé *et al.*, 2015a & 2015b)<sup>51</sup>. As the same theoretical and methodological

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<sup>50</sup> Although it should be taken into account that the consumer price index (CPI) reflects the consumption package of the average consumer, it is the way proposed to uprating the budgets annually (Bradshaw *et al.*, 2008; Lehtinen, Varjonen, Raijas i Aalto (2011) and Storms *et al.* (2013). In this case we used the general consumer price index for the province of Barcelona, as it is the territory most densely populated in Catalonia (CPI average 1st sem 2016 / CPI average 1st sem 2014: 0,995) (INE, 2016b).

<sup>51</sup> Within the ImPRovE project the following baskets of goods and services were developed: Healthy Food, Suitable Clothing, Rest and Leisure, Personal and Health Care, Maintaining Significant Social Relations, Safety in Childhood, Mobility and Housing for six European cities: Antwerp, Athens, Barcelona, Budapest, Helsinki and Milan (Goedemé *et al.*, 2015a). The *Pilot Project for the development of a common methodology on reference budgets in Europe* developed the Healthy Food basket for 26

approach is used to develop the budgets it is of great value to compare and see if the budgets developed in our context follow the same trends regarding the relative weight of the different baskets in relation to the total budget. Secondly, as far as we know there is no other experience of developing reference budgets in the national context from a needs-based perspective and so, we would compare the results with previous research in the field based on consumption surveys and also the actual expenditure of households. Thirdly, how reference budgets could contribute to estimate the additional expenses per child in a household. Finally, we would conclude identifying the elements that enhanced the rigor in the development of the RBs indicator.

In the ImPRovE project the RBs were build starting from a common basket of goods and services and adapted to the local context according to the institutional framework, the geographical and climate conditions, the cultural habits and the availability, quality and price of the various goods and services (Storms *et al.*, 2013). The Healthy Food basket represented the larger share of the total budget and the Maintaining Significant Social Relations basket accounted for the second largest share for families without children in all cities (Goedemé *et al.*, 2015). However, for families with children the Clothing basket was also an important part of the total budget and in some cities the second largest share.

These trends have also been observed in the case the RBs developed for Barcelona. For the Healthy Food it was observed that couples with two children will need 4,37 more budget to ensure a healthy diet than a single woman, which illustrates inexistent economies of scale. The *Pilot Project for the development of a common methodology on reference budgets in Europe* in which food budgets were developed for 26 capital cities in Europe also estimated that the cost of a healthy diet for couples plus two children would be between 3,5 and 4 times more than for a single person depending on the city (Goedemé *et al.*, 2015b). The baskets with less weight in relation to the total budget were the Rest and Leisure, the Personal Care, the Health Care baskets and the Mobility basket when car cost were left out. In the latter ones, as commented in the previous section, the low budget needed for an adequate social participation is explained by the provision of subsidized goods and services. Nonetheless, we should take into

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European capitals, the Personal Care and the Health Care for 8 European capitals and the Housing baskets for 7 European capitals (Goedemé *et al.* 2015b). From our research group PSITIC we have contributed in both projects to elaborate reference budgets for Barcelona and Madrid as reference cities, respectively.

account that in the case of Health Care contraceptive pills and dental care services are not subsidised in our context, the same happens in Greece and Italy, which explains the higher cost of the basket because of these categories.

Regarding Personal Care, as well as other European cities, it was observed that hair care, perfumes and cosmetics and shaving for man represent the most important costs of this basket (Goedemé *et al.*, 2015b). The goods and services foreseen in these baskets were also contrasted with densely populated areas in Catalonia throughout focus groups discussions.

Our results slightly differ from the previous research on RBs in Spain by ADICAE in 2009, based mainly on consumption surveys on the actual expenditure of households and using expert advice and focus group discussions (Warnaar & Luten, 2009). The preceding study estimated that monthly needs for a single person and a four members household would be, respectively, 534€ and 1262€ (without rent, heating, water, light and credits) (ADICAE, 2009). Our estimation of a minimum budget for an adequate social participation ranges from 422€ to 1549€ for the same family types (without housing basket and car costs). Although the results are quite similar, approaches diverge. Actual expenditure surveys reflect consumption patterns, which are influenced by preferences and social conditions. Conversely, RBs aim to determine individual or household needs from a rights and needs-based perspective.

For example, the cost of the Healthy Food differs from the expenses that can be observed in consumption surveys. According to the Spanish Household Budget Data the average expense on food and non alcoholic beverages per person in Barcelona households was 1.944€/year, i.e. 162€/month (Ajuntament de Barcelona, 2015). Data from the Spanish Panel of Food Consumption situates the average monthly expense per person at 127€, where meat and fish, along with fruits and vegetables are the biggest part of the budget (Mercasa, 2014:40). This estimate cost is aligned with the cost of the Healthy Food basket without kitchen equipment for a single woman (127,30€/month) and also for children (129,85€/month); whereas the expenditure for a single man would be higher (168,61€/month).

It should be stressed that average monthly expense per person varies depending on the composition of the household and the SES. For example, single adults and couples without children have a higher per capita food consumption with regard to the national average (57,4% and 32,4% of the deviation, respectively), whereas single parents and families with young children tend to show lower per capita food consumptions (-15,3% and -30,9% of the deviation). When looking at the variation by SES, it can be observed that families in the lower quartile have a lower per capita food consumption (-7,4%); while those classified as medium-high or high SES present 13,6% higher per capita food consumption with regard to the national average (Mercasa, 2014:44). Not only the consumption is lower among the families from low SES, but changes in the types of products consumed can also be observed (Fundación Española de Nutrición, 2013). In any case, consumption surveys do not always reflect the real household costs on a specific category, which is, in fact, one of the reasons why RBs have been proved to be a better tool to estimate consumption, since they are based on more specific individual or household needs. Therefore, this characteristic allows estimating the additional costs of an adult or child from a normative approach.

Within the ImPRovE project it was highlighted the importance of the extra expending for a child in a single parent household and the fact that the cost increases with age, particularly for the Healthy Food, Safety in Childhood, Personal Care, Health Care and Mobility baskets. Furthermore, it was shown how the institutional context explains the variability of these costs between cities (Penne *et al.*, 2016). In the case of the RBs developed for Barcelona and contrasted with for densely populated areas in Catalonia it should be stressed that education cost within the Safety in Childhood are higher than in the budgets for the other European cities within the ImPRovE project, especially for primary school children, due to the out of pocket expenses that parents should spend on school material and books. For this reason the Safety in Childhood basket represent the second largest share of the total budget for couples with two children.

Thus, the reference budgets developed from this needs-based approach could contribute to assess children and family needs in our context, where there is still a lack of research on costs for children. From this perspective it was estimated that a 10 year-old child would need 345,61 Euros, while 14 year-old girl would need 449,51 in a single parent family (see Table 39, section 12.2, Study 1). The Healthy Food and the Safety in Childhood basket represented the most important share of the total budget. The only study that came to similar results was conducted by FEDAIA, a non-profit organisation in Catalonia specialised in taking care of young children, which calculated that the cost of raising a child in a residential care centre is 428,12€/month (Montserrat, Vilà & FEDAIA, 2015). In this way, the reference budgets could provide regular information on the cost of children in the household, which could be used to monitor social policies, such as promote adequate child benefits.

Finally, following the criteria of Guba (1981) for naturalistic inquiries, we describe the elements that enhance the rigor in the development of the RBs indicator. As we aimed to construct reference budgets as representative as possible in our context different sources of information were used according to the methodology stated in Storms *et al.* (2013). Where possible the starting points were guidelines and expert advice, but also we collected experientially-grounded knowledge from focus groups and other scientific or survey data. This triangulation has been a key element to guarantee the *credibility* on the results obtained. Additionally, the process of the constructing the baskets have been fully described, including the documenting of all choices and critical reflections of the decisions made, as well as an accurate analysis of discussions in the focus groups. In this way, we guaranteed *dependability* and *transferability* in other contexts. At the same time, this allowed minimizing the subjectivity of the researcher, which was also sustained by feedback from the partners and coordinators of the ImPRovE project, as well as the thesis supervisor and members of the research group, all together to achieve *confirmability*.



### Question 3

*‘How the reference budgets could be a complementary approach to contextualise at-risk-of-poverty indicator in densely populated areas in Catalonia?’*

Poverty in Spain has consistently increased since 2007, which makes it unlikely to reach the Spanish National Europe 2020 target of reducing by 1.400.000 the number of people at-risk-of-poverty or exclusion (AROPE). Although it has been pointed out that Spain is recovering from the recent crisis and experiencing economic growth, further EU policy recommendations are still formulated in order to fight unemployment and high private and public debt in this country (European Commission, 2015). The high child poverty rate in Catalonia has been highlighted especially when measured using at-risk-of-poverty threshold (AROP60 indicator) (Study 2).

Child poverty rate is seen in our context as a structural problem that has worsened with the recent economic crisis (González-Bueno & Bello, 2014). Particularly, a study by Bárcena-Martín, Moro-Egido & Pérez-Moreno (2016) has shown that households with children are not only the most vulnerable, but more affected by the economic crisis in 2008-2012. Furthermore, this type of households experimented less income growth in the expansive period 2004-2008 compared to households without children.

In the last decade, complementary indicators to the AROP60 have been developed in Europe, OECD and Spain, all of them contributing to understand poverty as a multidimensional phenomenon. Since 2010, at the European level and in order to assess the advances to the *Europe 2020 targets*, the cross-nationally indicator taken as a reference is the AROPE indicator. This indicator defines the population living in poverty or social exclusion as the one experimenting one of the following situations: being at-risk-of-poverty threshold (AROP60 indicator), lacking 4 items out of a list of 9 (severe material deprivation) and living in a household with low intensity work (Comision Europea, 2010). The data to estimate the indicator for all countries is obtained using EU-SILC. Nonetheless, since 2012 the material deprivation indicator has been submitted to revision in order to gain robustness across EU-countries and provide an accurate measurement of deprivation for adults and children (Guio & Marlier, 2013).

At the same time, criticisms of the AROP60 indicator appeared, especially because it fixes the poverty threshold at an arbitrary point on the income distribution, usually taking the national territory as a reference, which rather illustrates income inequality than a standard of living (Borgeraas & Brusdal, 2008; Storms, 2012). Furthermore and, concerning child poverty, it is questioned if the national median household income is the most adequate threshold to estimate the resources needed to raise a child because the income approach does not reflect savings or debts (e.g. related to housing), the value of home produced goods, the help from other family members or the accessibility to public goods and services, such as health care or education (UNICEF, 2007 & 2012).

For this reasons, there is a need in our context to foster a better understanding of child poverty, taking into account children rights and duties, and their material and non material needs from a child-centred approach (Truñó i Salvadó, 2012). Since 2010 UNICEF Spain has selected 49 indicators that contribute to assess periodically advances in child-well being in Spain and their regions in the following seven dimensions: education, health and security, material well-being, family and social environment, vulnerable childhood, life styles and subjective well-being (UNICEF, 2010 & 2011; González-Bueno *et al.*, 2012; González-Bueno & Bello, 2014). The proposal is based on previous work done by the Innocenti Research Centre for different OECD countries (UNICEF, 2007 & UNICEF, 2013) and takes into account the relative poverty measure, as well as other objective and subjective indicators. Thus, child poverty is understood as opposed to well-being. Although the approach contributes to highlight different areas of social policy intervention to improve child-well being, it depends on the availability of surveys with comparable data across the Spanish territory.

As far as we know, our research presents for the first time in our territory RBs developed from a needs-based perspective to estimate the minimum financial resources for an adequate social participation, which have been constructed using expert advice, other information sources and views of the general population. According to Lister (2004) this standard of living could be understood as a non-arbitrarily poverty threshold, which is based on empirical evidence, as well as on democratic evidence because it aims to find out a consensus on the society. Therefore, the RBs approach could be an additional tool to contextualise at-risk-of-poverty threshold and monitor social policy in the context of the *Europe 2020 Strategy* (Goedemé *et al.*, 2015a; Penne *et al.*, 2016;

Saunders, 2000; Vranken, 2010).

The results in Study 2 illustrate that when estimating poverty through the RBs indicator in Catalonia densely populated areas an income at the level of this threshold is too low to participate adequately in society. When housing costs are included nearly 18% of the population would have insufficient resources in this territory, while the AROP60 indicator only identifies 14% of the population living in poverty in this areas in 2012. Although both indicators signalled the same groups at risk (private tenants, households with children, and people under the age of 18), the RBs indicator tends to overemphasise poverty compared to the AROP60. This could be explained by the steeper equivalence scales taken into account for children in the case of the RBs indicator, as well as the fact that real housing costs have been added.

For a comparative purpose, in Figure 23 the RBs are expressed as a percentage of the Catalan poverty threshold, defined at 60% of disposable equivalised household median income. In 2014 the level of this threshold was 9.667,3€/year (i.e. 805,61€/month) for a single person household, which could be adapted to various family types using the modified OECD equivalence scale (Idescat, 2017c; UNICEF, 2012)<sup>52</sup>. This figure should be carefully interpreted, as the RBs have been developed for thoroughly-described family types, having good health and living in urban environment – Barcelona as a reference city and contrasted for Catalonia densely populated areas – while the at-risk-of-poverty threshold refers to the Catalan population as a whole. The exercise shows that the RBs for private tenants, at the level of the Catalan poverty threshold, for all family types, is not sufficient to participate adequately in society. In the case of outright owners, at the level of the at-risk-of-poverty threshold, they are financially able to participate in society, although families with two children will be nearly at the border line.

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<sup>52</sup> Couple (equivalence scale 1,5): 14.500, 95 €/year (1.208,41€/month); Single woman, plus boy 10 years (equivalence scale 1,3): 12.567,49 €/year (1.047,29€/month); Couple, plus boy 10 years old and girl 14 years old (equivalence scale 2,3), : 22.234,79 €/year (1.852,90€/month).

The use of the RBs approach highlights the impact that high housing costs have on the total budget, as well as the fact that the relative costs of a child in a household might be underestimated through the modified OECD equivalence scale, as other research has pointed out (Borgeraas & Brusdal, 2008; Goedemé *et al.* 2015a; Oldfield & Bradshaw, 2011; Storms & Van den Bosch 2009). For example, although further analysis is necessary, the equivalence scales derived from the RBs developed from a cross-national perspective within the ImPRovE project illustrate that the weight of a primary school child (6-11 years old) without housing cost oscillates around 0,6 – 0,7 depending on the country, while the OECD scale assumes 0,3 for a child of this age. RBs scale decreases for all countries when housing costs are added, particularly for private tenants (Penne *et al.*, 2016).

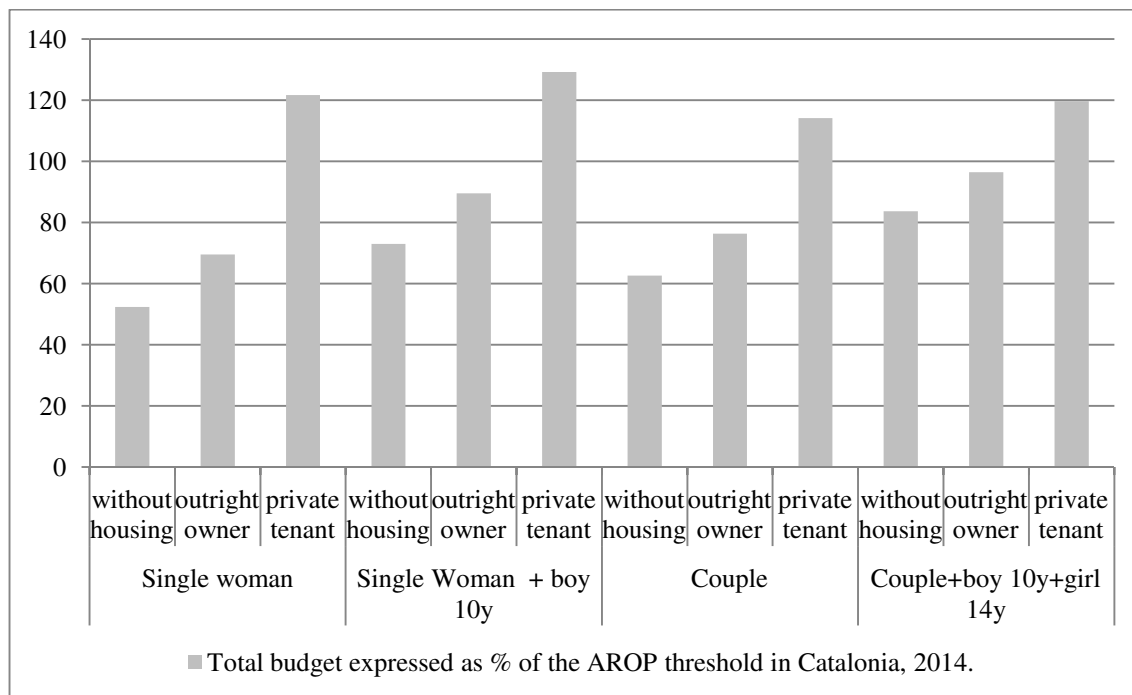
In general the RBs indicator applied as poverty threshold in Belgium and Finland also identified private tenants, single parents and couples with children and members under the age of 18 as vulnerable groups. However, some differences could be appreciated when AROP60 threshold is applied in these countries. The AROP60 threshold tends to overemphasise poverty for single persons and elderly in these countries compared to the RBs threshold (Penne *et al.*, 2016). For the elderly group this could be explained by the ownership of the dwelling, which means that low housing costs are imputed for the RBs indicator and, thus, this turns out to a lowest threshold (Mäkinen, 2015; Penne *et al.*, 2016). Conversely, in Catalonia and Spain the lowest poverty risk for adults and elderly people when measured through the AROP60 could be explained by an efficient system of social transfers and pensions for these groups (Cantó, 2014).

Therefore, in this research we have explored how the RBs from a needs-based perspective could help to complement at-risk-of-poverty threshold in our territory. Particularly, we have observed how the RBs indicator estimates higher poverty rates for families with children and children under the age of 18. The fact that RBs start from individual and household needs illustrate the “real” out-of-pocket expenses that families and children need for their social participation. In this way it is defined a consensual local living standard at a given moment of time, which is independent of income evolution.

Nevertheless, the indicator faces some limitations that should be taken into account when analysing the results above and should be addressed in future research. First, RBs were developed for specific family types. More variation in the reference situations should be taken into account in order that reference budgets could be extrapolated to poverty lines for the whole population. For example, in order to estimate accurately equivalence scales, further information on costs for elderly people or children under 6 of age, as well as for other health conditions and environments is needed.

Secondly, other ways to add housing costs should be explored and also take into account expenditure data on other needs such as health care, child care or education because there is a great variation on these costs across households. However, due to data constraints in EU-SILC this has not been possible (Penne *et al.*, 2016). Finally, in order to discuss the results for poverty thresholds in Catalonia with the previous work within the ImPRovE project for Belgium, Finland and Spain we have used EU-SILC survey, which includes a representative sample for the studied territory. This has allowed us to compare the poverty thresholds for various population sub-groups and in relation to other European countries. Nonetheless, if local survey data is available in the future it would be better to use it. For all this important challenges, at the moment, reference budgets could be used as an “informative benchmark” for the AROP60 threshold, rather than an alternative indicator for poverty measurement, as suggested in Penne *et al.* (2016).

Figure 23. Total budget (Euros/month) for various family types and tenure status expressed as a percentage of at-risk-of-poverty threshold in Catalonia, 2014.



Source: Own computations, except for housing costs (Goedemé *et al.*, 2015a). At-risk-of-poverty threshold retrieved on 01/03/2017 from Idescat through ECV 2015 by INE. Values refer to 2014 (Idescat, 2017c).

Aside from poverty measurement other uses of the RBs approach were found in the international literature, that could be grouped in two main areas of action: social policy (macro level) and budget advice or financial education (micro level) (Preuße, 2012; Storms *et al.*, 2014). Therefore, in this section we consider how the developed RBs could contribute to assess children and family needs in our territory and therefore, could be used as a tool to design socio-educative actions to guarantee social rights and tackle child poverty. First, we suggest the use of RBs in the field of social policy: concretely, as a benchmark to assess the adequacy of social benefits. Secondly, we propose RBs as an instrument for the evaluation of children and family needs in the context of poverty, as well as to strengthen their self-sufficiency and skills. Finally, we conclude with some recommendations to be taken into account for the implementation of the RBs in our context.

The reference budgets developed for densely populated areas in Catalonia illustrate the minimum budget for an adequate social participation in our context. To the best of our knowledge, this is the first attempt to construct RBs from an approach based on both rights and needs in this territory. In the previous section it was estimated that

nearly 18% of the population would have insufficient resources to reach this standard of living. For these reasons the estimated RBs could be used as a benchmark to assess the adequacy of the Minimum Income Protection Schemes (MIPS), as other countries apply (Van Lancker, 2015).

Different studies agree that the design of Minimum Income Policies in Spain is very complex, heterogeneous across the territory, inadequate and inefficient to reduce poverty (De la Peña-Esteban, Fernández-Sáinz, Peña-Miguel, 2015; Gimeno Ullastres, 2015; Malgesini-Rey, 2014). In Table 42 we compare the budgets for three family types with the minimum income allowance – “*Renda Mínima d’Inserció*”, RMI - in Catalonia (the administrative region for which RBs have been compiled) for the year 2014. The RMI establishes a minimum of 423,70€/month for singles and an additional amount of 55,29€/month per child until a maximum of 645,30€/month per household, the equivalent to the minimum wage for the same year<sup>53</sup>. We observe that the RMI covers nearly the total amount of the RBs for singles and a large part of the RBs for families with children, between 41-61% of the RBs when housing costs are not included. However, the RMI is clearly insufficient for a social participation at the minimum for private tenants and, particularly, for families with children. The RMI underestimates the additional expenses that children represent in a household. According to our results (Table 39, section 12.2, Study 1) an additional amount of 55,29€/month per child would be insufficient even to cover a healthy diet for a primary school child (129,85€/month). In addition, the RMI does not take into account the age of children, which is an element that influences the variation of the additional costs, as shown in the same section.

Consequently, we suggest that the use of RBs could help to assess the adequacy of MIPS or minimum wage across Spain because RBs are developed locally, taking into account the geographical and institutional contexts, the availability of public goods and services, cultural habits and prices in each autonomous region or concrete cities. However, we should keep in mind that any social assistance support should involve specialised professionals that understand the family and children needs and guide throughout a networked socio-educative process the social inclusion of people experimenting poverty (Longás, Riera & Civís, 2016; Riera, 2012a). Hence, in this

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<sup>53</sup> The minimum wage (“Salario mínimo interprofesional”) is established by the Spanish government for all the country. In 2014 this amount was 645,30€/month in 14 annual payments.

process people are recognised as active citizens and not only passive beneficiaries of goods and services.

In our context, there is a lack of common consensus on indicators to assess families living in poverty in order to plan social action (Puig Cruells (coord.) *et al.*, 2013). For this purpose the developed RBs could offer a framework for the evaluation of children and family needs, as well as for the empowerment of people suffering from financial constraints. This is the case when using RBs for budget advice or financial education. The level of RBs for an adequate social participation could be adapted for the analysis of each individual situation, considering the personal revenues and expenses. In this way, social workers or other specialised professionals could propose objectively, if necessary, additional financial support or promote a better management of the budget, also when people face debts (Cornellis *et al.*, 2012).

For this reason, an educative function should be foreseen in the RBs approach. For example, RBs provide a practical approach to address budgetary and cooking skills limitations, which are major drawbacks against the adoption of healthy eating habits, especially among low SES families (Darmon & Drewnowski, 2008; Lang, 2005). An excellent example is the case of Belgium, where the RBs have even resulted in the edition of two recipe books on the budget and healthy meals (Cornellis & Vandervoort, 2011 & 2013). Certainly, ensuring an adequate diet to everyone cannot only be achieved by teaching people to cook and eat healthily in an economical way. Indeed, it should not replace upstream improvement of the ultimate causes of unequal access to proper nutrition. Tackling social determinants such as income inequality, promoting better educational achievement and fostering social cohesion should be at the base of any action aiming at reducing child poverty.

In order that RBs could be used for these purposes some aspects should be ensured. First, the budgets reflect an acceptable standard of living for particular family types in a concrete context, independently from consumption patterns which are constrained by financial resources. This means that it is not possible to generalise the budget for the whole population. Nonetheless, RBs allow some flexibility and could be adapted to other family circumstances. Secondly, the development of the budgets should be transparently documented and arbitrary decisions minimized. This is essential to assure the reliability of the results. Finally, the regular maintenance of the RBs over



time is quite costly in terms of time, as well as no satisfactory method has been developed for updating the budgets (Storms *et al.*, 2014).

Furthermore, along with the availability of public goods and services, purchasing habits could differ between regions, as well as prices of goods in the private market. The Spanish National Institute of Statistics does not provide access to the basic information needed to calculate the PPP index at the regional level in Spain. A recent study used an alternative method to explore differences in regional price levels through GDP models and data on total expenditure, showing that Catalonia had price levels higher than the national average in 2012 (Costa, García, López & Raymond, 2015). Hence, if the purpose of the RBs was to guide social policies at regional or national level, the pricing process should be adapted and reference budgets developed for other territories (urban and rural areas). This are clearly challenges that should be faced in future research if RBs are foreseen in our context as a tool to guide actions to advance to an inclusive society.

Table 42. RMI 2014 for different family types as a proportion of the RBs with/without housing costs, 2014.

<b>Household type</b>	<b>RMI Catalonia 2014 (€/month)</b>	<b>SRB without housing (€/month)</b>	<b>Ratio of RMI to SRB without housing costs (%)</b>	<b>SRB outright owners (€/month)</b>	<b>Ratio of RMI to SRB outright owners (%)</b>	<b>SRB private tenant (€/month)</b>	<b>Ratio of RMI to SRB private tenants (%)</b>
Single Woman	423,70	426,67	99,30	564,67	75,03	984,20	43,05
Single Woman+1 Boy 10y	478,99	773,77	61,90	947,77	50,54	1362,14	35,16
Couple+1 Boy 10y+1 Girl 14y	645,30	1568,53	41,14	1804,53	35,76	2235,67	14,63

Source: Own computations, except for housing costs (Goedemé *et al.*, 2015a). Catalonia RMI 2014 (Malgesini-Rey, 2014:23).

## **PART VI: CONCLUSIONS / *CONCLUSIONS***

Here we summarize the main contributions of this dissertation. Moreover, we mention the limitations of our study and propose future lines of research.

First, the foremost contribution of this thesis is the use of the European indicator Reference Budgets (RBs) to approach poverty in densely populated areas in Catalonia, taking Barcelona as the reference city. The RBs reflect the minimum necessary resources for a family to participate adequately in society, which means that each member is able to develop its various social positions. In order to elaborate the contents of this indicator, we grouped intermediate needs into ten baskets of goods and services: Healthy Food, Suitable clothing, Rest, Leisure, Personal Care, Health Care, Maintaining Significant Social Relations, Safety in Childhood, Mobility and Housing.

The first stage of the study was developed within the European project ImPRovE. As a part of this European enterprise, we adapted the baskets of goods and services to the Catalan context. To this end, we took into account the corresponding regulations, guidelines, statistics, and opinions of experts in the field. The baskets were validated by studying consumption patterns and also by analyzing information from three focus groups only with adults. Finally, we assigned a cost to each product and service using selected prices from Barcelona in order to obtain a reference budget for each basket.

In the second stage of the project, we organized seven new focus groups with participants from densely populated areas in Catalonia. Of note, in these groups we included not only adults but also children, who are often overlooked in RBs studies. These groups provided key arguments to better understand the needs of the population under study. Moreover, we observed a social consensus regarding the minimal resources required to attain an adequate social participation in these areas.

Second, after developing and validating the indicator for densely populated areas in Catalonia, we explored its potential to reflect poverty in this territory. Firstly, we adapted the RBs to establish a poverty threshold using the method developed in the European project ImPRovE. Next, we estimated poverty for different population groups in densely populated areas in Catalonia using the RBs and the at-risk-of-poverty (AROP60) thresholds by means of EU-SILC for the year 2012.

Below we summarize the main results obtained in this research process:

- There is a clear consensus on social positions, intermediate needs and minimal resources to attain an adequate social participation:
  - The most important social positions are those related to the family and social environments.
  - All intermediate needs considered are deemed essential in our context.
  - The goods and services have all been accepted by the participants in the focus groups. It should be noted that the age plays a key role in the selection of the items for each basket.
- The estimated reference budget, not taking into account the housing and private transportation, ranges from 422 Euros/month for a single adult in working age and 1549 Euros/month for a couple with two children.
- The Healthy Food basket is the one that has the most weight in the global reference budget in all ten family types included in this study, whereas the Rest, Leisure, Personal Care and Health Care baskets have the least weight.
- The goods and services provided by the state reduce the reference budget for the Mobility and Health Care baskets.
- The estimated additional cost of including a child in the household ranges from 346 to 449 Euros/month depending on the age. These amounts do not include housing and private transportation.
- In the global reference budget for children, the Healthy Food basket is also the one with the most weight.
- Safety in Childhood is the second basket with most weight in the global reference budget for children. Among the goods and services included in this basket, education is the one that requires most resources.
- The estimated reference budget for a child is higher than the one corresponding to a second adult in the household. Therefore, the equivalence scales obtained from RBs are higher for children, i.e. children have a more weight in the global household budget.

- Using the RBs approach, we estimated that 18% of the population in densely populated areas in Catalonia have insufficient resources to participate adequately in society. The result obtained with the AROP60 indicator using the EU-SILC 2012 identifies that 14% of the population is living in poverty in this territory.
- The RBs as a poverty indicator tend to indicate that a larger number of the population is at risk of poverty than when using the AROP60 indicator. This result could be explained by the difference in magnitude of the equivalence scales used in each method.
- Both the RBs and the AROP60 indicator point toward the same groups at risk of poverty: people renting a house at market price, households with children and people under the age of 18.

The purpose of the developed RBs is to establish a standard of living below which it is not possible to play the consensual social positions. It is important to bear in mind that this indicator has not been developed to prescribe people what they need to have or do. RBs are built upon normalized needs established in our society, which are identified through analysis and focus groups; thus, they do not reflect the current consumption. Nonetheless, RBs are an excellent tool to estimate the additional cost of children in the households and take into account the state-subsidized goods and services.

The first step to continue this project would be to expand family types beyond the ones we have considered here, which are: adults in working age (30-50 years old) and children (10-14 years old) living in urban environments, which are in good health, well informed, and with enough competencies and autonomy to lead a normal life. Future research in this field in our country could focus on constructing RBs for other contexts, for example, elders, toddlers, people living in rural areas or population with particular health conditions. A larger and more diverse set of households would make our results more generalizable for all individuals in a population. Furthermore, although developing this indicator has required analysing a large amount of data, it would be necessary to update the estimate annually if it is to be applied in the development of social policies or to measure poverty. Finally, including other needs such as Security or Life Long Learning would further add up to this valuable indicator.

Overall, RBs provide a new approach to child poverty in Catalonia, complementing the traditional measurement of poverty represented by the at-risk-of-poverty indicator, which is based on income distribution. Moreover, the budgets have the advantage that they are less influenced by the economic fluctuations. RBs not only establish a financial threshold to enjoy an acceptable standard of living but also indicate the intermediate essential needs. Hence, RBs open a new way to channel social and educational actions to fight poverty.

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## APÈNDIXS

### Apèndix 1. Full informatiu i sol·licitud de permís al centre

Apreciados/as,

Desde el grupo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC), dirigido por el Dr. Jordi Riera i Romaní, de la Facultat de Psicologia, Ciències de l'Educació i l'Esport Blanquerna de la Universitat Ramon Llull, estamos llevando a cabo un proyecto de investigación para evaluar el coste mínimo de una adecuada participación social de los niños/as y sus familias en Cataluña. Este indicador social, llamado en inglés "*reference budgets*" nos permite conocer y contextualizar mejor la pobreza infantil en nuestro territorio, así como también diseñar acciones socioeducativas para combatir esta problemática.

Por este motivo, solicitamos la colaboración voluntaria de su institución situada en un municipio densamente poblado en Cataluña. Esta colaboración implica organizar 2 grupos de discusión (de 8 personas máximo cada uno), uno con padres/madres con hijos/as de 8 a 16 años a cargo y otro con adolescentes de 14 a 16 años de edad. Agradeceremos que los perfiles de los participantes se ajusten al máximo a los criterios que os adjuntamos.

**Características de los adultos:** (1) hombres y/o mujeres de entre 30 y 55 años que viven en zonas densamente pobladas en Cataluña; (2) adultos que tengan a su cargo niños/as de entre 8 y 16 años, ya sea en familias biparentales y/o monoparentales; (3) el grupo debe ser heterogéneo, es decir, dentro de cada grupo cabe contar con personas de perfil socio-económico bajo (p.e. 3 personas), medio (p.e. 3 personas) y alto (p.e. 2 personas), según su situación en relación al trabajo (ocupados o parados) y su nivel de estudios (sin estudios o primarios, secundarios o superiores) y (4) buscamos personas que tengan criterios y opinión propia, con buena predisposición y facilidad para interactuar en grupo.

**Características de los jóvenes adolescentes:** (1) chicos/as de 3º o 4º de la ESO (de 14 a 16 años) que viven en zonas densamente pobladas en Cataluña; (2) adolescentes que vivan en familias biparentales y/o monoparentales; (3) el grupo debe ser heterogéneo, es decir, dentro de cada grupo cabe contar con personas de perfil socio-económico bajo (3 personas), medio (3 personas) y alto (2 personas), según la situación en relación al trabajo de sus padres (ocupados o parados) y de su nivel de estudios (sin estudios o primarios, secundarios o superiores) y (4) buscamos chicos/as que tengan criterios y opinión propia, con buena predisposición y facilidad para interactuar en grupo.

En los grupos de discusión trataremos los siguientes temas: (1) reflexionar en torno a las necesidades esenciales que se tienen que cumplir para que las personas participen adecuadamente en la sociedad, (2) discutir los bienes y servicios que se requieren para satisfacer éstas necesidades y (3) las pautas de consumo en nuestro contexto. Durante la discusión no buscamos respuestas correctas a las preguntas, sino recoger distintas opiniones acerca de los temas planteados. Por ello se anima a que los participantes argumenten sus distintos puntos de vista, ya que todos tienen un valor para nuestro estudio. Utilizaremos grabación de voz para poder transcribir y analizar posteriormente la discusión.

Se propone que la sesión tenga lugar durante el mes de abril de 2016 en las instalaciones de la institución colaboradora, en una sala adecuada para la investigación, con una duración máxima de 2h (adultos) y 1h30 (adolescentes), acordando con el centro, los participantes y la investigadora el día, fecha y hora de las sesiones.

Los participantes recibirán una gratificación mediante una tarjeta de Abacus valorada en 40€ (adultos) y 30€ (adolescentes) que se entregará por correo postal como reconocimiento de su aportación.



Todos los participantes tendrán asignado un código por lo que es imposible identificar al participante con las respuestas dadas, garantizando totalmente la confidencialidad. Los datos que se obtengan de su participación no se utilizarán con ningún otro fin distinto del explicitado en la investigación y solo el personal investigador implicado directamente en la investigación tendrá acceso.

El fichero de datos del estudio estará bajo la responsabilidad del investigador principal, ante el cual podrá ejercer en todo momento los derechos que establece la Ley 15/1999 de Protección de Datos Personales. Asimismo, se pide respeto y confidencialidad en relación a la opinión del resto de participantes en la discusión.

En caso de estar interesados en el estudio, rogamos se pongan en contacto con Irene Cussó para confirmar la colaboración del centro y acordar los procedimientos para seleccionar a los participantes, hacerles llegar las hojas de información y recoger los consentimientos informados, así como concretar día y hora para organizar las sesiones. El centro figurará en el estudio como centro colaborador.

Muchas gracias de antemano por su colaboración y para cualquier cuestión relacionada con la investigación quedamos a su disposición.

Cordialmente,  
Irene Cussó i Parcerisas  
Doctoranda del grupo PSITIC  
Teléfono: 932533000  
Grupo de investigación PSITIC  
FPCEE Blanquerna – Universitat Ramon Llull

**HOJA DE OTORGAMIENTO DE PERMISO - CENTRO  
COPIA PARA EL CENTRO**

Yo,....., mayor de edad, con  
DNI....., responsable/director del centro/entidad  
.....

**DECLARO QUE:**

He recibido información sobre el proyecto *“Reference budgets”: un nou indicador social per contextualitzar la pobresa infantil i guiar l’acció socioeducativa. Avaluació del cost mínim d’una adequada participació social dels infants i les seves famílies a Catalunya*, del que se me ha entregado hoja informativa anexa a este consentimiento y para el que se solicita la colaboración de nuestra institución.

He entendido su significado, me han sido aclaradas las dudas y me han sido expuestas las acciones que se derivan del mismo. Se me ha informado de todos los aspectos relacionados con la confidencialidad y protección de datos en cuanto a la gestión de datos personales que comporta el proyecto y las garantías tomadas en cumplimiento de la Ley 15/1999 de Protección de Datos Personales.

La colaboración de nuestra institución en el proyecto es totalmente voluntaria y tenemos derecho a retirarnos del mismo en cualquier momento, revocando el presente consentimiento, sin que esta retirada pueda influir negativamente en nuestra institución en sentido alguno. En caso de retirada, tenemos derecho a que nuestros datos sean cancelados del fichero del estudio.

Por todo ello,

**DOY MI CONSENTIMIENTO A:**

1. Participar como institución colaboradora en el proyecto *“Reference budgets”: un nou indicador social per contextualitzar la pobresa infantil i guiar l’acció socioeducativa. Avaluació del cost mínim d’una adequada participació social dels infants i les seves famílies a Catalunya*

2. Que el equipo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC) y al Dr. Jordi Riera i Romaní como investigador principal, puedan gestionar los datos de los participantes y difundir la información que el proyecto genere. Se garantiza que se preservará en todo momento la identidad e intimidad de los participantes, con las garantías establecidas en la ley 15/1999 de protección de datos y normativa complementaria.

3. Que el equipo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC) conserve todos los registros efectuados sobre los participantes en soporte electrónico, con las garantías y los plazos legalmente previstos, si estuviesen establecidos, y a falta de previsión legal, por el tiempo que fuese necesario para cumplir las funciones del proyecto para las que los datos fueron recabados.

4. Colaborar voluntariamente con la investigación seleccionando los participantes de acuerdo con los criterios establecidos en la investigación y facilitar la tramitación de las hojas de información y consentimientos informados a los participantes. La institución figurará en el estudio como entidad colaboradora.

5. Ceder una sala de forma gratuita para realizar los grupos de discusión adecuada a las necesidades del estudio.

Fecha: ....., el ... de .....de 2016.

[FIRMA DEL RESPONSABLE DE LA INSTITUCIÓN]

Dr. Jordi Riera i Romaní      Irene Cussó i Parcerisas

## **Apèndix 2. Full informatiu i consentiment informat adults**

Apreciado/a,

Desde el grupo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC), dirigido por el Dr. Jordi Riera i Romaní, de la Facultat de Psicologia, Ciències de l'Educació i l'Esport Blanquerna de la Universitat Ramon Llull, estamos llevando a cabo un proyecto de investigación para evaluar el coste mínimo de una adecuada participación social de los niños/as y sus familias en Cataluña. Este indicador social, llamado en inglés “*reference budgets*” nos permite conocer y contextualizar mejor la pobreza infantil en nuestro territorio, así como también diseñar acciones socioeducativas para combatir esta problemática.

Por este motivo y en el contexto de ésta investigación, solicitamos su participación voluntaria, ya que cumple con los criterios de inclusión en el estudio, adulto de 30 a 55 años de edad que vive en zona densamente poblada en Cataluña.

Esta colaboración implica participar en un grupo de discusión con otras personas adultas donde trataremos los siguientes temas: (1) reflexionar en torno a las necesidades esenciales que se tienen que cumplir para que las personas participen adecuadamente en la sociedad, (2) discutir los bienes y servicios que se requieren para satisfacer éstas necesidades y (3) las pautas de consumo en nuestro contexto.

Durante la discusión no buscamos respuestas correctas a las preguntas, sino recoger distintas opiniones acerca de los temas planteados. Por ello se anima a que los participantes argumenten sus distintos puntos de vista, ya que todos tienen un valor para nuestro estudio. Utilizaremos grabación de voz para poder transcribir y analizar posteriormente la discusión.

La sesión tendrá lugar durante el mes de abril de 2016 en el centro escolar y/o de tiempo libre con una duración máxima de 2h, de acuerdo con el centro, los participantes y la investigadora.

Como reconocimiento de su aportación, recibirá una gratificación mediante una tarjeta de Abacus valorada en 40€ que se entregará por correo postal.

Todos los participantes tendrán asignado un código por lo que es imposible identificar al participante con las respuestas dadas, garantizando totalmente la confidencialidad. Los datos que se obtengan de su participación no se utilizarán con ningún otro fin distinto del explicitado en la investigación y solo el personal investigador implicado directamente en la investigación tendrá acceso. El fichero de datos del estudio estará bajo la responsabilidad del investigador principal, ante el cual podrá ejercer en todo momento los derechos que establece la Ley 15/1999 de Protección de Datos Personales. Asimismo, se pide respeto y confidencialidad en relación a la opinión del resto de participantes en la discusión.

En caso de estar interesados en participar en el estudio, rogamos confirmar su participación al centro y completar todas las copias de los consentimientos informados. Las copias para el equipo de investigación (pág.3) deben de ser entregadas al centro antes del día de realización del grupo de discusión.

Muchas gracias por su atención y quedamos a su disposición para cualquier cuestión.

Cordialmente,

Irene Cussó i Parcerisas  
Doctoranda del grupo PSITIC  
Teléfono: 932533000  
Grupo de investigación PSITIC  
FPCEE Blanquerna – Universitat Ramon Llull

**CONSENTIMIENTO INFORMADO – ADULTOS  
COPIA PARA EL PARTICIPANTE**

Yo, ....., mayor de edad, con DNI....., actuando en nombre e interés propio y dirección postal.....

**DECLARO QUE:**

He recibido información sobre el proyecto *“Reference budgets”: un nou indicador social per contextualitzar la pobresa infantil i guiar l’acció socioeducativa. Avaluació del cost mínim d’una adequada participació social dels infants i les seves famílies a Catalunya*, del que se me ha entregado hoja informativa anexa a este consentimiento y para el que se solicita mi participación.

He entendido su significado, me han sido aclaradas las dudas y me han sido expuestas las acciones que se derivan del mismo. Se me ha informado de todos los aspectos relacionados con la confidencialidad y protección de datos en cuanto a la gestión de datos personales que comporta el proyecto y las garantías tomadas en cumplimiento de la Ley 15/1999 de Protección de Datos Personales.

Mi colaboración en el proyecto es totalmente voluntaria y tengo derecho a retirarme del mismo en cualquier momento, revocando el presente consentimiento, sin que esta retirada pueda influir negativamente en mi persona en sentido alguno. En caso de retirada, tengo derecho a que mis datos sean cancelados del fichero del estudio.

Por todo ello,

**DOY MI CONSENTIMIENTO A:**

1. Participar en el proyecto *“Reference budgets”: un nou indicador social per contextualitzar la pobresa infantil i guiar l’acció socioeducativa. Avaluació del cost mínim d’una adequada participació social dels infants i les seves famílies a Catalunya*
2. Que el equipo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC) y al Dr. Jordi Riera i Romaní como investigador principal, puedan gestionar mis datos personales y difundir la información que el proyecto genere. Se garantiza que se preservará en todo momento mi identidad e intimidad, con las garantías establecidas en la ley 15/1999 de protección de datos y normativa complementaria.
3. Que el equipo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC) conserve todos los registros efectuados sobre mi persona en soporte electrónico, con las garantías y los plazos legalmente previstos, si estuviesen establecidos, y a falta de previsión legal, por el tiempo que fuese necesario para cumplir las funciones del proyecto para las que los datos fueron recabados.

Fecha: ....., el ... de .....de 2016.

[FIRMA DEL PARTICIPANTE]

Dr. Jordi Riera i Romaní

Irene Cussó i Parcerisas

### Apèndix 3. Full informatiu i consentiment informat adolescents

#### HOJA INFORMATIVA DE LA INVESTIGACIÓN

Apreciado/a,

Desde el grupo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC), dirigido por el Dr. Jordi Riera i Romaní, de la Facultat de Psicologia, Ciències de l'Educació i l'Esport Blanquerna de la Universitat Ramon Llull, estamos llevando a cabo un proyecto de investigación para evaluar el coste mínimo de una adecuada participación social de los niños/as y sus familias en Cataluña. Este indicador social, llamado en inglés “*reference budgets*” nos permite conocer y contextualizar mejor la pobreza infantil en nuestro territorio, así como también diseñar acciones socioeducativas para combatir esta problemática.

Por este motivo y en el contexto de ésta investigación, solicitamos tu participación voluntaria, ya que cumples con los criterios de inclusión en el estudio, como estudiante del segundo ciclo de la ESO que vive en zona densamente poblada en Cataluña.

Esta colaboración implica participar en un grupo de discusión con otros estudiantes de tu edad donde trataremos los siguientes temas: (1) reflexionar en torno a las necesidades esenciales que se tienen que cumplir para que las personas participen adecuadamente en la sociedad, (2) discutir los bienes y servicios que se requieren para satisfacer éstas necesidades y (3) las pautas de consumo en nuestro contexto.

Durante la discusión no buscamos respuestas correctas a las preguntas, sino recoger distintas opiniones acerca de los temas planteados. Por ello se anima a argumentar vuestros distintos puntos de vista, ya que todos tienen un valor para nuestro estudio. Utilizaremos grabación de voz para poder transcribir y analizar posteriormente la discusión.

La sesión tendrá lugar durante el mes de abril de 2016 en el centro escolar y/o de tiempo libre con una duración máxima de 1h30, de acuerdo con el centro, los participantes y la investigadora, alterando mínimamente tus actividades.

Como reconocimiento de tu aportación, recibirás una gratificación mediante una tarjeta de Abacus valorada en 30€ que se entregará por correo postal.

Todos los participantes tendrán asignado un código por lo que es imposible identificar al participante con las respuestas dadas, garantizando totalmente la confidencialidad. Los datos que se obtengan de tu participación no se utilizarán con ningún otro fin distinto del explicitado en la investigación y solo el personal investigador implicado directamente en la investigación tendrá acceso. El fichero de datos del estudio estará bajo la responsabilidad del investigador principal, ante el cual podréis ejercer en todo momento los derechos que establece la Ley 15/1999 de Protección de Datos Personales. Asimismo, te pedimos respeto y confidencialidad en relación a la opinión del resto de participantes en la discusión.

En caso de estar interesado en participar en el estudio, rogamos informar del estudio a tus padres y/o tutor legal mediante la hoja informativa anexa (pág.4), confirmar vuestra participación al centro y completar todas las copias de los consentimientos informados. Las copias para el equipo de investigación (pág.3 y 6) deben de ser entregadas al centro antes del día de realización del grupo de discusión.

Muchas gracias por tu atención y quedamos a tu disposición para cualquier cuestión.

Cordialmente,

Irene Cussó i Parcerisas

Doctoranda del grupo PSITIC

Teléfono: 932533000

Grupo de investigación PSITIC. FPCEE Blanquerna – Universitat Ramon Llull

## CONSENTIMIENTO INFORMADO – JÓVENES COPIA PARA EL PARTICIPANTE

Yo,....., menor de edad, con DNI.....y dirección postal.....

### DECLARO QUE:

He recibido información sobre el proyecto *“Reference budgets”: un nou indicador social per contextualitzar la pobresa infantil i guiar l’acció socioeducativa. Avaluació del cost mínim d’una adequada participació social dels infants i les seves famílies a Catalunya*, del que se me ha entregado hoja informativa anexa a este consentimiento y para el que se solicita mi participación.

He entendido su significado, me han sido aclaradas las dudas y me han sido expuestas las acciones que se derivan del mismo. Se me ha informado de todos los aspectos relacionados con la confidencialidad y protección de datos en cuanto a la gestión de datos personales que comporta el proyecto y las garantías tomadas en cumplimiento de la Ley 15/1999 de Protección de Datos Personales.

Mi colaboración en el proyecto es totalmente voluntaria y tengo derecho a retirarme del mismo en cualquier momento, revocando el presente consentimiento, sin que esta retirada pueda influir negativamente en mi persona en sentido alguno. En caso de retirada, tengo derecho a que mis datos sean cancelados del fichero del estudio.

Por todo ello,

### DOY MI CONSENTIMIENTO A:

1. Participar en el proyecto *“Reference budgets”: un nou indicador social per contextualitzar la pobresa infantil i guiar l’acció socioeducativa. Avaluació del cost mínim d’una adequada participació social dels infants i les seves famílies a Catalunya*
2. Que el equipo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC) y al Dr. Jordi Riera i Romaní como investigador principal, puedan gestionar mis datos personales y difundir la información que el proyecto genere. Se garantiza que se preservará en todo momento mi identidad e intimidad, con las garantías establecidas en la ley 15/1999 de protección de datos y normativa complementaria.
3. Que el equipo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC) conserve todos los registros efectuados sobre mi persona en soporte electrónico, con las garantías y los plazos legalmente previstos, si estuviesen establecidos, y a falta de previsión legal, por el tiempo que fuese necesario para cumplir las funciones del proyecto para las que los datos fueron recabados.

Fecha: ....., el ... de .....de 2016.

## HOJA INFORMATIVA DE LA INVESTIGACIÓN – PADRES y/o TUTOR LEGAL

Apreciado/a,

Desde el grupo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC), dirigido por el Dr. Jordi Riera i Romaní, de la Facultat de Psicologia, Ciències de l'Educació i l'Esport Blanquerna de la Universitat Ramon Llull, estamos llevando a cabo un proyecto de investigación para evaluar el coste mínimo de una adecuada participación social de los niños/as y sus familias en Cataluña. Este indicador social, llamado en inglés “*reference budgets*” nos permite conocer y contextualizar mejor la pobreza infantil en nuestro territorio, así como también diseñar acciones socioeducativas para combatir esta problemática.

Por este motivo y en el contexto de ésta investigación, solicitamos la participación voluntaria de su hijo/a, ya que cumple con los criterios de inclusión en el estudio, como estudiante del segundo ciclo de la ESO, que vive en zona densamente poblada en Cataluña.

Esta colaboración implica participar en un grupo de discusión con otros estudiantes de su edad donde trataremos los siguientes temas: (1) reflexionar en torno a las necesidades esenciales que se tienen que cumplir para que las personas participen adecuadamente en la sociedad, (2) discutir los bienes y servicios que se requieren para satisfacer éstas necesidades y (3) las pautas de consumo en nuestro contexto.

Durante la discusión no buscamos respuestas correctas a las preguntas, sino recoger distintas opiniones acerca de los temas planteados. Por ello se anima a los jóvenes a argumentar sus distintos puntos de vista, ya que todos tienen un valor para nuestro estudio. Utilizaremos grabación de voz para poder transcribir y analizar posteriormente la discusión.

La sesión tendrá lugar durante el mes de abril de 2016 en el centro escolar y/o de tiempo libre con una duración máxima de 1h30, de acuerdo con el centro, los participantes y la investigadora, alterando mínimamente sus actividades.

Como reconocimiento de su aportación, recibirá una gratificación mediante una tarjeta de Abacus valorada en 30€ que se entregará por correo postal.

Todos los participantes tendrán asignado un código por lo que es imposible identificar al participante con las respuestas dadas, garantizando totalmente la confidencialidad. Los datos que se obtengan de su participación no se utilizarán con ningún otro fin distinto del explicitado en la investigación y solo el personal investigador implicado directamente en la investigación tendrá acceso. El fichero de datos del estudio estará bajo la responsabilidad del investigador principal, ante el cual podréis ejercer en todo momento los derechos que establece la Ley 15/1999 de Protección de Datos Personales. Asimismo, se pide respeto y confidencialidad en relación a la opinión del resto de participantes en la discusión.

En caso de estar interesados en participar en el estudio, rogamos confirmar vuestra participación al centro y completar todas las copias de los consentimientos informados. Las copias para el equipo de investigación (pág. 3 y 6) deben de ser entregadas al centro antes del día de realización del grupo de discusión. Muchas gracias por vuestra atención y quedamos a su disposición para cualquier cuestión.

Cordialmente,

Irene Cussó i Parcerisas  
Doctoranda del grupo PSITIC  
Teléfono: 932533000  
Grupo de investigación PSITIC  
FPCEE Blanquerna – Universitat Ramon Llull

**CONSENTIMIENTO INFORMADO – PADRES y/o TUTOR LEGAL  
COPIA PARA EL PARTICIPANTE**

Yo, ....., con DNI.....,  
como padre/madre/tutor legal del alumno/a (nombre y apellidos  
alumno)....., con DNI (alumno).....y  
dirección postal.....

**DECLARO QUE:**

He recibido información sobre el proyecto *“Reference budgets”: un nou indicador social per contextualitzar la pobresa infantil i guiar l’acció socioeducativa. Avaluació del cost mínim d’una adequada participació social dels infants i les seves famílies a Catalunya*, del que se me ha entregado hoja informativa anexa a este consentimiento y por el cual se solicita la participación del alumno (nombre y apellido).....

He entendido su significado, me han sido aclaradas las dudas y me han sido expuestas las acciones que se derivan del mismo. Se me ha informado de todos los aspectos relacionados con la confidencialidad y protección de datos en cuanto a la gestión de datos personales que comporta el proyecto y las garantías tomadas en cumplimiento de la Ley 15/1999 de Protección de Datos Personales.

Su colaboración en el proyecto es totalmente voluntaria y tiene derecho a retirarse del mismo en cualquier momento, revocando el presente consentimiento, sin que esta retirada pueda influir negativamente en su persona en sentido alguno. En caso de retirada, tiene derecho a que sus datos sean cancelados del fichero del estudio.

Por todo ello,

**DOY MI CONSENTIMIENTO A:**

1. Que mi hijo/a participe en el proyecto *“Reference budgets”: un nou indicador social per contextualitzar la pobresa infantil i guiar l’acció socioeducativa. Avaluació del cost mínim d’una adequada participació social dels infants i les seves famílies a Catalunya*
2. Que el equipo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC) y al Dr. Jordi Riera i Romaní como investigador principal, puedan gestionar sus datos personales y difundir la información que el proyecto genere. Se garantiza que se preservará en todo momento su identidad e intimidad, con las garantías establecidas en la ley 15/1999 de protección de datos y normativa complementaria.
3. Que el equipo de investigación en Pedagogía, Sociedad e Innovación con el apoyo de las TIC (PSITIC) conserve todos los registros efectuados sobre su persona en soporte electrónico, con las garantías y los plazos legalmente previstos, si estuviesen establecidos, y a falta de previsión legal, por el tiempo que fuese necesario para cumplir las funciones del proyecto para las que los datos fueron recabados.

Fecha: ....., el ... de .....de 2016.

[FIRMA DEL PADRE,  
MADRE O TUTOR LEGAL]

Dr. Jordi Riera i Romaní      Irene Cussó i Parcerisas



#### Apèndix 4. Fitxa sociodemogràfica participants adults

Fitxa sociodemogràfica del participant al grup de discussió - ADULTS		
Dia de realització del grup de discussió: ...../...../.....		
Lloc de realització del grup de discussió:		
Nom (de pila):		
Població on resideix:		
Barri on resideix:		
Nacionalitat:		
1. Lloc de naixement (ciutat o poble):		
2. Any de naixement:		
3. Sexe: Masculí <input type="checkbox"/> Femení <input type="checkbox"/>	4. Quina és la seva situació familiar? Visc sol/a amb fills/es i/o menors al meu càrrec <input type="checkbox"/> Visc en parella i amb fills/es i/o menors al meu càrrec <input type="checkbox"/> Altres, especifiqui: <input type="checkbox"/> .....	
5a. N° de fills i/o menors al seu càrrec: <input type="text"/>	5b. Especifiqui l'edat dels fills o menors al seu càrrec: Fill 1: ..... edat Fill 2: ..... edat Fill 3: ..... edat Fill 4: ..... edat Fill 5: ..... edat Altres: ..... edat	
6. Indiqui N° total de persones a la llar (comptant-se a si mateix): <input type="text"/>		
7. Quina és la seva professió?: .....		
8. Quina és la professió de la seva parella (si viu en parella)?:.....		
9a. Quina és la seva situació laboral?	<input type="checkbox"/>	Jornada completa
	<input type="checkbox"/>	Entre el 50% i el 99% de jornada
	<input type="checkbox"/>	Mitja jornada
	<input type="checkbox"/>	En permís de maternitat/paternitat
	<input type="checkbox"/>	Aturat
	<input type="checkbox"/>	Estudiant
	<input type="checkbox"/>	Pensionista
	<input type="checkbox"/>	Altres.....
9b. Quina és la situació laboral de la seva parella? (si viu en parella)	<input type="checkbox"/>	Jornada completa
	<input type="checkbox"/>	Entre el 50% i el 99% de jornada
	<input type="checkbox"/>	Mitja jornada
	<input type="checkbox"/>	En permís de maternitat/paternitat
	<input type="checkbox"/>	Aturat
	<input type="checkbox"/>	Estudiant
	<input type="checkbox"/>	Pensionista
	<input type="checkbox"/>	Altres.....
10a. ¿Quin és el seu nivell màxim d'estudis assolit?	<input type="checkbox"/>	Sense estudis formals o educació primària
	<input type="checkbox"/>	Educació secundària obligatòria

	<input type="checkbox"/>	Educació secundària post obligatòria (batxillerat, cicle formatiu de grau mig, COU)
	<input type="checkbox"/>	Formació professional superior (cicle formatiu de grau superior)
	<input type="checkbox"/>	Estudis universitaris (diplomatura, llicenciatura, grau, màster o doctorat)
10b. Quin és el nivell màxim d'estudis assolit per la seva parella? (si viu en parella)	<input type="checkbox"/>	Sense estudis formals o educació primària
	<input type="checkbox"/>	Educació secundària obligatòria
	<input type="checkbox"/>	Educació secundària post obligatòria (batxillerat, cicle formatiu de grau mig, COU)
	<input type="checkbox"/>	Formació professional superior (cicle formatiu de grau superior) 2
	<input type="checkbox"/>	Estudis universitaris (diplomatura, llicenciatura, grau, màster o doctorat)

10c. Indiqui l'edat d'inici de la seva escolarització:

11. Situï en una escala de l'1 (excel·lent) al 5 (dolent) com valora el seu estat de salut.

1 (excel·lent)  2 (molt bo)  3 (bo)  4 (regular)  5 (dolent)

12. En els últims 12 mesos, quantes vegades ha realitzat vacances amb la seva família?

Cap vegada  1 vegada  2 vegades  Més de 2 vegades

13. Quants ordinadors hi ha a la seva llar?  Cap  1  2  Més de 2

14. Té la seva família cotxe propi o furgoneta?  No  Sí, 1  Sí, més d'1

15. Disposen el seu/s fill/s de dormitoris per a ells sols?  No  Sí

16. Indiqui el N° de dormitoris que té l'habitatge on viu habitualment:

17. Indiqui el N° de banys que té l'habitatge on viu habitualment:

18. Indiqui en quin tipus d'habitatge viu:

De propietat  De propietat amb hipoteca  De Lloguer  Altres

19. Situï en una escala de l'1 al 5 quin nivell de càrrega econòmica li suposen les despeses totals mensuals de la seva llar (incloent també les despeses d'habitatge com el pagament de hipoteca i/o de lloguer i els diferents subministraments energètics):

On "1" correspon a 'No em suposen cap càrrega' i "5" és 'Sí, són per mi una gran càrrega'.

1 2 3 4 5

## Apèndix 5. Fitxa sociodemogràfica participants adolescents

Fitxa sociodemogràfica del participant al grup de discussió – JOVES ADOLESCENTS	
Dia de realització del grup de discussió: ...../...../.....	
Lloc de realització del grup de discussió:	
Nom (de pila):	
Població on resideixes:	
Barri on resideixes:	
Nacionalitat:	
Curs:	
Centre escolar:	
1. Lloc de naixement (ciutat o poble):	
2. Any de naixement:	
3. Sexe: Masculí <input type="checkbox"/> Femení <input type="checkbox"/>	4. Indica el teu lloc habitual de residència: Visc en 1 llar <input type="checkbox"/> Visc en 2 llars <input type="checkbox"/> Altres (residències, internats, etc) <input type="checkbox"/>
5. Marca amb quines persones vius: Mare <input type="checkbox"/> Pare <input type="checkbox"/> Germans/es <input type="checkbox"/> Parella de la mare <input type="checkbox"/> Parella del pare <input type="checkbox"/> Altres familiars <input type="checkbox"/> Altres persones <input type="checkbox"/>	6a. N° de germans/es (sense comptar-te a tu): <input type="text"/> 6b. N° total de persones a la llar (comptant-te a tu mateix): <input type="text"/>
7. Especifica la PROFESSIÓ de la teva MARE:	
8. Especifica la PROFESSIÓ del teu PARE:	

9. Marca amb una X on correspongui quina és la situació laboral actual de la teva mare i pare:

	Mare	Pare
1. En actiu (està treballant)		
2. Aturat/a (no treballa)		
3. Jubilat/da		

10. Indica el nivell màxim d'estudis dels teus pares (marca amb una (X) on correspongui):

	Mare	Pare
1. Sense estudis formals o educació primària		
2. Educació secundària obligatòria		
3. Educació secundària post obligatòria (batxillerat, cicle formatiu de grau mig, COU)		
4. Formació professional superior (cicle formatiu de grau superior)		
5. Estudis universitaris (diplomatura, llicenciatura, grau, màster o doctorat)		

11. Situa en una escala de l'1 al 5 com valors el teu estat de salut:

1 (excel·lent)  2 (molt bo)  3 (bo)  4 (regular)  5 (dolent)

12. En els últims 12 mesos, quantes vegades has realitzat vacances amb la teva família?

Cap vegada  1 vegada  2 vegades  Més de 2 vegades

13. Quants ordinadors hi ha a la teva llar?

Cap  1  2  Més de 2

14. Té la teva família cotxe propi o furgoneta?

No  Sí, 1  Sí, més d'1

15. Disposes d'un dormitori per a tu sol?  No  Sí

16. Indica el N° de dormitoris que té l'habitatge on vius habitualment:

17. Indica el N° de banys que té l'habitatge on vius habitualment:

18. Indica en quin tipus d'habitatge vius:

De propietat  De propietat amb hipoteca  De Lloguer  Altres

## **Apèndix 6. Resum en català dels Resultats i Discussió**

En el següent enllaç hi ha disponible el resum en català de la Part IV i V de la tesi: Resultats i Discussió, <https://goo.gl/LVnpaA>