

# Reference Budgets for Social Participation: leading the way to a social inclusive society. What we learned and results for Spain

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## ABSTRACT

Reference Budgets are priced baskets of goods and services that represent a given living standard for well-described model families and are seen as an alternative approach to measure poverty lines, which could serve to assess social policies, as well as they can be used to other purposes in the financial and educational fields.

This report describes the process of development and the content of the different baskets on the Spanish Reference Budgets built as a part of the European funded ImPRovE project, in which cross-nationally comparable reference budgets have been developed for different European countries using a common theoretical framework and methodology. In our case, the city of reference is Barcelona.

Thus, the structure of this paper has two main parts: in the first one the common theoretical framework and methodology are briefly presented, along with the general particularities of the development of the Spanish Reference Budgets. In the second section the components of every basket and the process to build them is described in detail. Finally, we draw some conclusions.

**Keywords:** reference budgets, social participation, social inclusion.

## RESUM

Els pressupostos de referència – “*reference budgets*”, en anglès – són cistelles de béns i serveis que representen un nivell de vida determinat per a diferents tipologies de família. Aquest indicador pot servir per contextualitzar la pobresa, avaluar les polítiques socials, així com també per altres propòsits en el camp financer o educatiu.

Aquest informe descriu el procés d’elaboració dels pressupostos de referència per Espanya en el marc del projecte europeu ImPRovE, en el qual s’han construït de manera comparable per sis ciutats europees seguint un marc teòric i un mètode comú. En el nostre cas, la ciutat de referència és Barcelona.

L’estructura d’aquest document té dues parts principals: en la primera es presenta breument el marc teòric i metodologia emprada, així com les particularitats dels pressupostos de referència desenvolupats. Mentre que a la segona part es detallen els components de cada una de les cistelles, les fonts d’informació i el procés per construir-les. Per últim, presentem algunes conclusions generals en relació al procés i la metodologia emprada.

**Paraules clau:** pressupostos de referència, participació social, inclusió social.

# 1. BRIEF THEORETICAL FRAMEWORK AND METODOLOGY

## 1.1. Theoretical Framework

The Spanish Reference Budgets (RB) that we present in this paper are part of the European funded ImPROvE project (Working Package 13), in which cross-nationally comparable reference budgets have been developed for Belgium, Finland, Greece, Hungary, Italy and Spain using a common theoretical framework and a common methodology, as well as other commonly agreed criteria. Reference Budgets are priced baskets of goods and services that represent a given living standard for well-described model families. RB are seen as an alternative approach to measure poverty lines, which could serve to assess social policies, as well as they can be used to other purposes in the financial and educational fields.

Thus, we present here the development of these Reference Budgets for Spain. Following the methodology described in Storms, Goedemé, Van den Bosch, and Devuyt (2013), we used a three-step procedure for developing reference budgets. The first step was to define the societal, minimum acceptable living standard which reference budgets must correspond to. In a second phase, minimal living standards were translated into (i) intermediary needs, (ii) concrete baskets of goods and services and (iii) priced lists of those goods and services. During the third phase the acceptability of the baskets was tested through focus group discussions and the baskets developed in the second phase were subsequently adjusted in accordance with focus group results.

To define a minimum acceptable living standard, Storms et al. (2013) departed from Doyal and Gough (1991: 170), who identify ten intermediate needs that must be fulfilled before people can fully participate in society: (1) Healthy food, (2) Security in Childhood; (3) Suitable clothing, (4) Meaningful social relations, (5) Personal hygiene; (6) Lifelong learning; (7) Accessible healthcare; (8) Rest and relaxation; (9) Adequate housing.

Physical health ('bodily integrity') and autonomy of agency ('practical reason') are conditions that influence life in great measure and can modify the previous needs. For that reason our reference budgets are only built for healthy autonomous people.

A common theoretical and methodological framework does not provide an answer to all the questions. Unavoidably, arbitrary elements will easily sneak in. So, during the development of the common methodology other important decisions were taken to ensure a common start based and whenever arbitrary choices are unavoidable, we have tried to ensure that the choices made are as much as possible similar for all participating countries. We believe that common choices must at least be made regarding the geographical scale that is kept in mind when developing reference budgets, the selection of a core list of model families, the procedure for attaching prices to the baskets of goods and services, and the way reference budgets will be adjusted over time. Thus, the following decisions were made:

1. To develop reference budgets for the following cities in an urbanized environment: Antwerp, Helsinki, Athens, Budapest, Milan and Barcelona.
2. To develop RB for four household types: (1) a single adult (male, female), (2) a couple (male, female); (3) a single woman/man + child boy (primary school, 10y-old); (4) a couple + 2 children (primary school boy, 10y-old + secondary school girl, 14y-old).
3. Furthermore, we assumed that all the members are healthy and well-informed autonomous persons.
4. To develop reference budgets for non-working adults as well as for working adults. Concerning the working adults, we chose for full-time working one earner households (full-time working adult in single and one parent families and one full time working adult in the case of couples).
5. To develop reference budgets for tenants in private and public housing and for outright homeowners and for homeowners that have to pay mortgage.
6. In absence of data about the optimal time to review the content and price of the baskets, it is proposed to adjust the price levels on a yearly basis and the composition of the baskets of goods and services at least every five years.

The housing basket is being prepared by the Belgian team using the same data sources for the different countries, so in the following pages we describe in detail the methodology followed to develop all the others baskets on Reference Budgets for Spain –healthy food, clothing, personal care, health care, rest and leisure, safety in childhood, maintaining social relations and mobility, as well as we present their content and pricing.

## 1.2. Methodology

In the next pages, we describe in more detail the procedure followed in order to translate the intermediary needs in the eight baskets that contain the priced goods and services that allow people to participate in the society and fulfill the social roles. We explain (1) the different information sources used to adapt and justify the content of each basket in our context; (2) how we prepared and developed the focus group discussions; (3) the procedure followed to price the content of the baskets; (4) the research calendar.

### 1.2.1. Information sources

First, in order to determine and adapt the concrete list of goods and services required in our context we used different sources of information: expert knowledge, official guidelines and specific regulations (includes laws at national (Spain) and autonomous level (Catalonia)), scientific literature or survey data also in both territorial levels and if available referring to Barcelona city. Finally, all the baskets were discussed in the focus groups (see section 1.2.2). The next table synthesizes the different resources used in each basket.

Table 1. Sources of information to elaborate the Spanish reference budgets.

<b>BASKET</b>	<b>Personal Expert Knowledge</b>	<b>Official Guidelines and regulations</b>	<b>Scientific literature</b>	<b>Survey data</b>	<b>Focus groups</b>
<b>Healthy Food</b>	X	X	X		X
<b>Clothing</b>	X	X	X	X	X
<b>Personal Care</b>	X				X
<b>Health Care</b>	X			X	X
<b>Rest &amp; Leisure</b>	X		X	X	X
<b>Safety in Childhood</b>	X	X	X	X	X
<b>Maintaining Social Relations</b>		X		X	X
<b>Mobility</b>				X	X

A part from the use of focus group discussions to validate the items included in the baskets, the table shows that personal expert knowledge and survey data are the main sources of information used. It is also relevant to point out that the lack of official guidelines and regulations, only used in four out of the eight baskets, made necessary to search for other



sources of knowledge that helped us to determine the content of each basket. At the same time, this triangulation of different sources of information makes the process more robust, though one of the problems is how to decide which information “has the final word”, as observed in Goedemé *et al.* (2014). In our case, arguments obtained in focus groups discussions were very important to make these final decisions and also common criteria agreed between partners in order to guarantee cross-nationally comparability.

### **1.2.2. Design and development of the focus groups**

As said before, in this research we used focus groups (FG) discussions with the purpose to test the acceptability and feasibility of the different baskets in our context. The main objective of using this technique was to hear opinions and arguments about the composition of the baskets and to see if there were forgotten or unneeded items included in the baskets. So, the discussions served to validate the guidelines and expert recommendations. In this section, we explain (i) the strategy we followed to recruit the focus group participants; (ii) the composition of the sample; (iii) a brief valuation of the focus groups discussion.

#### ***Recruitment Plan: access to the sample***

We approached respondents through public and private social organisations that helped us to recruit between 6 or 8 participants maximum per group. First, we contacted the organizations by telephone in order to confirm their interest and collaboration. Then, we sent them a letter by email that specified in more detail the research purpose and our needs regarding the participant’s characteristics: adult between 30 – 50 years old (male or female), with children between 8-16 years old in a single-parent or bi-parental family, employed or unemployed and with different levels of income (low, medium and high<sup>1</sup>).

#### ***Composition of the sample and participants profile***

Finally, we conducted 3 focus group discussions (2 took place in Barcelona city and 1 in a village of the Barcelona Metropolitan Area). The first one was developed in December 2013 and served as a test-focus group. The other two took place in March 2014. The focus groups were held in a room prepared for the occasion by the social organisations. In total we had 20 participants and each focus group lasted approximately 90 minutes. As a way to thank the participants for their attendance and collaboration we offered them some snacks and soft drinks. The discussion was guided mainly by one moderator with the support of another researcher. All the information was recorded. All the participants signed an agreement of participation in which we informed about the objectives of the research and guaranteed that the personal characteristics and all the opinions and arguments brought during the discussion would be

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<sup>1</sup> The poverty threshold was established at 15.082€/annual income in 2012 for a household of 2 adults and 2 children (INE, 2013). For this research in the “low income” range we understand those participants below 15.000€/annual household income; “Medium”: between 15.000 and 30.000 €/ annual income. “High”: over 30.000 €/annual income.

treated confidentially and in an anonymously way. The language of the discussion was Catalan and Spanish. The next tables show the composition of our final sample:

Table 2. Access to the sample and calendar.

	<b>Access to the sample</b>	<b>Calendar</b>
<b>FG1 (test FG)</b>	Social Services & Parents Association (Village Barcelona Metropolitan Area)	December 2013
<b>FG2</b>	NGO working with vulnerable families (Barcelona)	March 2014
<b>FG3</b>	Social Services (Barcelona)	March 2014

Table 3. Number of participants in each focus group and participant's socioeconomic profile.

<b>Participants</b>	<b>FG1-test</b>	<b>FG2</b>	<b>FG3</b>	<b>Total</b>
<i>Low income</i>	2	2	7	<b>11</b>
<i>Medium income</i>	2	0	1	<b>3</b>
<i>High income</i>	3	3	0	<b>6</b>
<b>Total</b>	<b>7</b>	<b>5</b>	<b>8</b>	<b>20</b>

The average age of the participants was 40 years old and they had children between 2 and 22 years old. In the next figures, other socio-demographic characteristics of the participants are shown, such as their gender, their place of birth, their education-level and their labour situation. In figure 1, we can observe that the majority of participants were women. The main place of birth was Catalonia (figure 2) and the maximum education level reached was secondary non-compulsory education (figure 3). The sample was quite equilibrated in terms of the working situation: working and non-working (figure 4).

Figure 1. Gender of the FG participants.

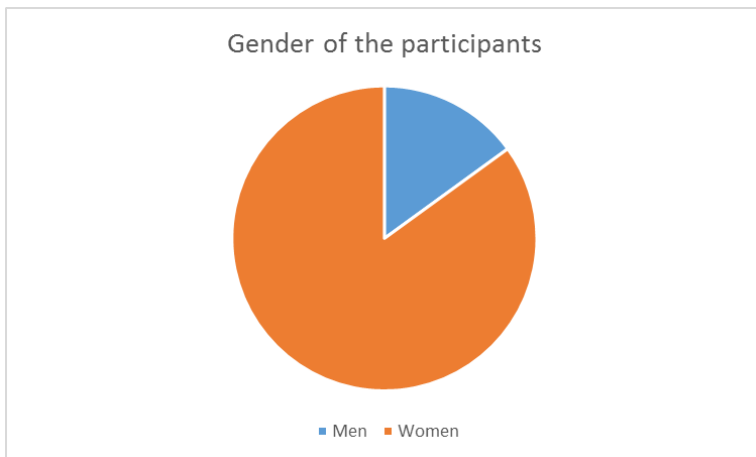


Figure 2. Place of birth FG participants.

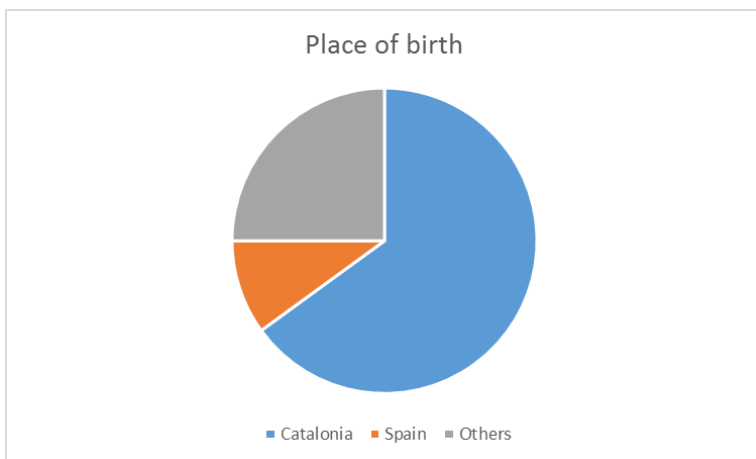


Figure 3. Maximum Level of Education reached by FG participants.

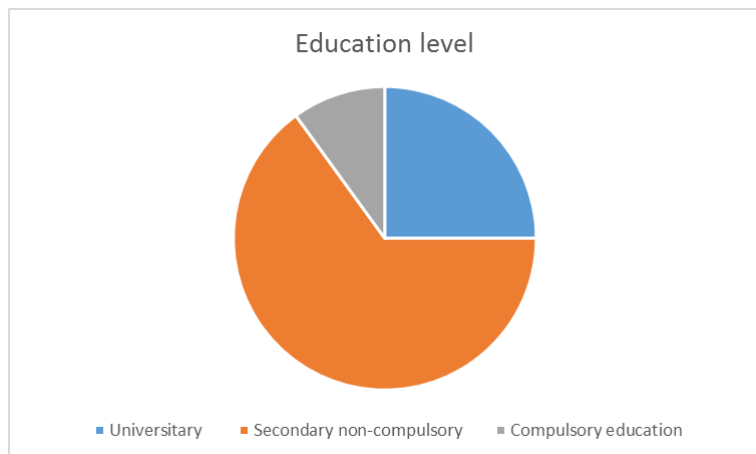
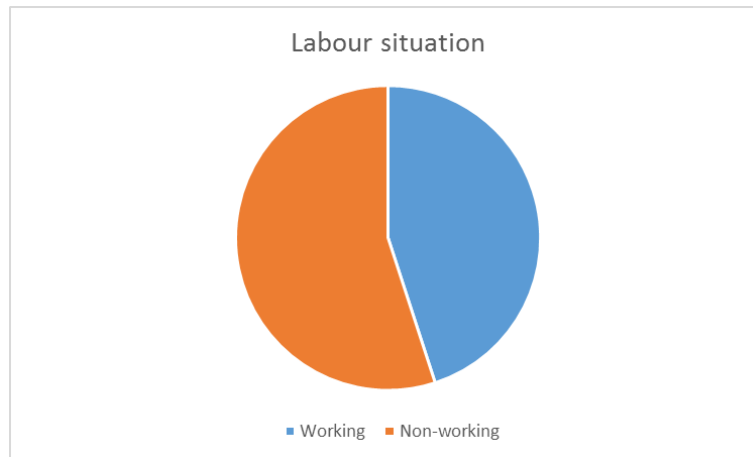


Figure 4. Labour situation of FG participants.



### ***Brief valuation of FG discussions***

Our overall impression was that the dynamics of the three FG went well. The participants had a very active role discussing all the questions and even some of them helped us to moderate the process.

In order to deep quickly into the discussion, it was helpful to use printed images and lists of the items selected to be discussed. In addition, it was very important before entering into the baskets discussion, to make clear the objectives of the research and their role as participants. It was also necessary to spend some time at the beginning to share the same definition of “decent life”, “social roles” and the concept of “model family”, which was the household type that we presented in order that participants could imagine the goods and services needed for the social participation of the reference household and the social roles that might be fulfilled in our society. Our case study was a couple with two children (a boy in primary-school and a girl in secondary-school), where the mother was not working, living in a rented apartment near a supermarket and in good health. In one of the focus groups composed by a majority of women that run a single parent family it was difficult for them to empathize with the model family presented. So, although this was the case study, we told the participants that other household types would be developed in the project and during the discussion we also tried to ask about possible differences in the case of single parent families.

In conclusion, we found the FGs technique adequate to the purpose of the research and useful to validate the content of every basket through arguments made by the participants. Moreover, one of the strengths of recruiting the participants through social organisations was that the participants had a very high commitment with the task because they had a link with the social organisation and, particularly, with the person that selected them and invited them to this activity. However, as shown before, the final sample was not equilibrated, particularly, in terms of gender. This is one of the risks we experienced using this way of recruitment, the control over

the eligibility of candidates. It is also true that in our society in care matters there are still differences between the roles and responsibilities taken by women and men. So, women could be more sensible and familiarised to the things related to care, children needs and domestic economy of a household. In this sense, women arguments were very reasoned and accurate, based on daily knowledge and experience and really helpful for our research. Another point of difficulty was that some of the participants, particularly those in a low income level were very affected by the economic crisis, unemployment and some of them with serious housing problems related to payment of some services, the rent or under eviction process. These particular situations made them very sensible to what the main social needs are, but it also made difficult sometimes to develop an abstract discussion far from their own preferences or needs. Despite these difficulties, the discussions were really deep and all along section 2 there are presented the FG results included in the discussion of each of the baskets.

### **1.2.3. Pricing**

After the selection of the items included in each of the baskets, the pricing process was the last step to develop. The procedure followed to price the content of the basket was: (1) choosing the shops; (2) choosing the concrete item and amount and the associated price and (3) calculate the price per month:

#### **Choosing the shops**

The shops chosen to price the items included depended on the content of the basket, but the shop selection responds to the arguments emerged in focus group discussion, expert advice or to guarantee cross-national comparability. Each basket describes the shops chosen and why. In any case, we want to make clear that this research is far from the intention of promoting any shop or commercial initiative.

#### **Choosing the concrete items and the associated price**

We did the pricing process through the shops' website and we did not take discounts or sales prices. We choose the item with the characteristics more suitable according to the function associated that should meet. In some cases, when the item included in the basket is rather an activity and not a material resource, we used also survey data to estimate the minimum budget needed to spend in such activity.

#### **Calculate the price per month**

After checking prices for each item, the price is multiplied by the amount required for that item and divided by the life span in months and so, the monthly price emerges.

In section 2 the specific pricing process developed for every basket is explained. Finally, the next table shows the calendar that synthesizes the different research steps already described.

### 1.2.4. Calendar

	2012			2013												2014												
	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	
Theoretical framework																												
Healthy Food																												
Clothing																												
Personal Care																												
Health Care																												
Rest and Leisure																												
Mobility																												
Safety in Childhood																												
Entertaining																												
Focus groups																												
Final Report																												

Legend:

Theoretical framework

Development of the initial concrete list of goods and services

Focus groups (number of FG conducted)

Pricing

Adaptations post FG and other methodological adaptations

## **2. BASKETS FOR SOCIAL PARTICIPATION AT THE MINIMUM**

In the next sections, we describe the components of each of the baskets according to our cultural and societal context. We start from the Belgian proposal and we justify the adaptations made according to the expert knowledge, official guidelines and specific regulations in our context, scientific literature or survey data. Secondly, the arguments of focus group participants are also introduced in the discussion in order to accurate the content of each basket or to validate the expert decisions. Finally, in each basket the pricing process is explained. In order to guarantee cross-national comparability common criteria are also assumed and introduced in the description of each basket.

## **2.1. THE HEALTY FOOD BASKET**

### **2.1.1. Starting point: Spanish food based dietary guidelines**

The Spanish Agency of Food Security and Nutrition (AESAN), along with the Spanish Society of Community Nutrition (SENC) is the institution that sets the nutritional recommendations for Spanish population. These recommendations are built upon the current scientific evidence on the nutritional needs of healthy individuals and take into account the main diet-related Public Health challenges as well as cultural habits of the Spanish population to promote healthy eating and regular physical activity.

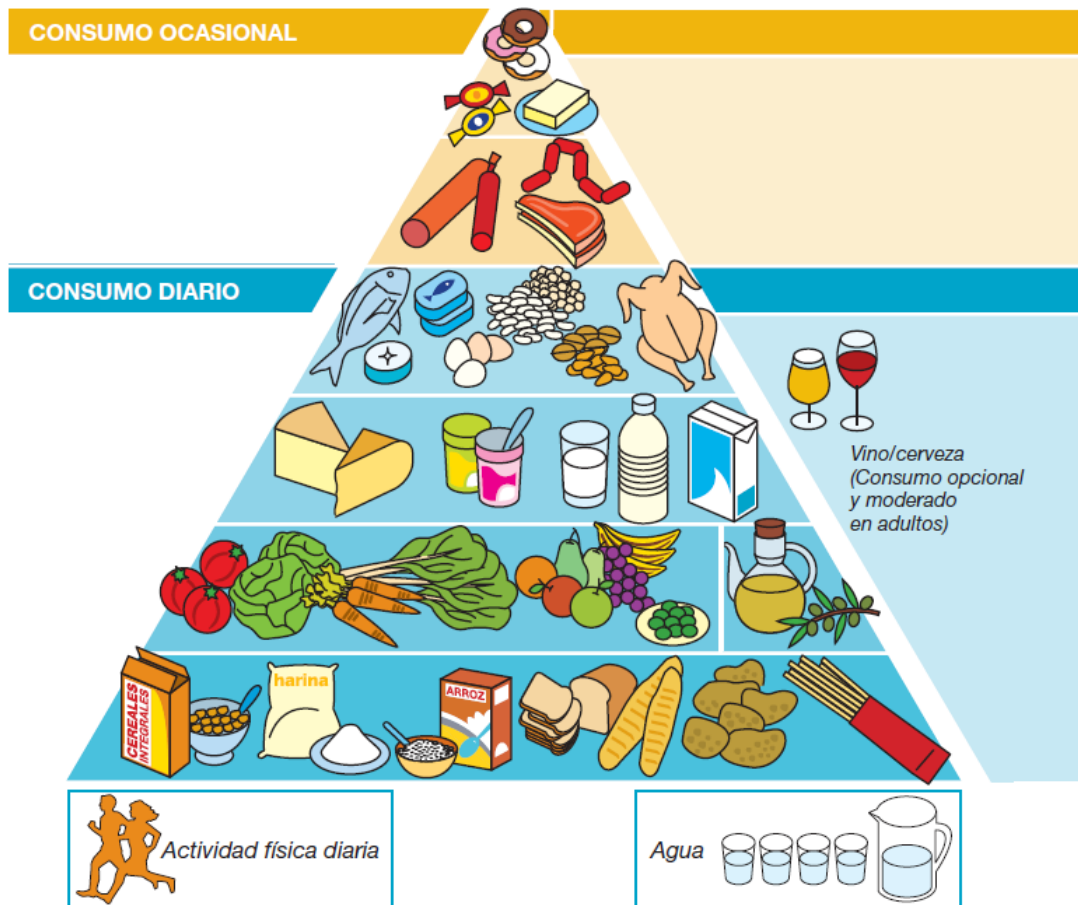
The Spanish Healthy Eating Pyramid is based on the principles of the Mediterranean Diet. It represents the lifestyle and the traditional eating habits of the Mediterranean countries and it appears to be an effective instrument for promoting health and general well-being.

In the last decades, the Spaniards have moved away from the Mediterranean Diet while the prevalence of diet-related chronic diseases such as diabetes, hypertension, hypercholesterolemia and obesity considerably increased sharply. The National Survey on Nutritional Intake (Spanish Agency of Food Security and Nutrition, 2011) showed that Spaniards do not meet the nutritional recommendations: the consumption of meat products is clearly above the reference, the intake of carbohydrates is below the 4-6 recommended portions, nut consumption is occasional instead of the 3-7 portions recommended per week and only about 40% of the population consumes the advised 5 daily portions of fruit and vegetables. On the other hand, Spanish fish consumption' seems to be within the amount and frequency advisable.

The Spanish Healthy Eating Pyramid (see Figure 5) considers 7 basic food groups: (1) grains and potatoes, (2) vegetables, (3) olive oil, (4) dairy products, (5) fish, meat, eggs, legumes and nuts, (6) processed meat products, (7) sweets. In addition, it includes water, physical activity and, optionally for adults, wine and bear in moderation. All food groups are significant. They make up a healthy diet or not depending on the proportion or each group, as well as on their frequency of consumption.



Figure 5. Healthy Eating Pyramid



Source: SENC (2004).

For that reason, the Spanish Healthy Eating Pyramid places in the lower levels vegetal foods. They provide key nutrients and other protective substances that contribute to a balanced diet and, consequently, to an overall better health. So they should be the basis of a healthy diet and should be consumed more frequently than the foods placed in the central or upper levels, which despite of being necessary, have to be eaten occasionally or in moderate amounts. Furthermore, the Healthy Eating Pyramid adds recommendations of hydration and physical activity, also two key elements for a healthy living.

The Spanish Healthy Eating Pyramid was developed in 2004. Whereas it is valid for all age groups, it only gives recommendation of portion quantities for adults. To establish the dietary needs for children, we make use of the recommendations elaborated within the PERSEO Programme (Pilot Programme in Schools for Health and Physical Exercise and against Obesity). The PERSEO Programme is a set of health promotion actions developed in 2006 by the Spanish Government to promote the learning of healthy eating habits and to encourage regular physical activity among schoolchildren, in order to prevent obesity and other chronic diseases. It constitutes the specific line of interventions for children and teenagers in the framework of the NAOS Strategy (Strategy for Nutrition, Physical Activity and the Prevention of Obesity), which aims to address the current Spanish obesity situation through an approach that involves families, communities,

schools, health centres and the private sector. Table 4 synthesizes the food-based dietary guidelines used to develop the Spanish Food Basket.

Table 4. Food-based dietary guidelines used to develop the Spanish Food Basket.

	Recommended frequency	Portion weight for ADULTS <sup>1</sup>	Portion weight for CHILD (6-10y old) <sup>2</sup>	Portion weight for CHILD (11-14y-old) <sup>2</sup>
Potatoes, rice, bread, pasta	4-6 portions a day	60-80g rice, pasta 40-60g bread 150-200g potatoes	60-80g rice, pasta 40-60g bread 150-200g potatoes 30g breakfast cereals	60-80g rice, pasta 40-60g bread 150-200g potatoes 30g breakfast cereals
Vegetables	≥2 portions a day	150-200g	200g	200g
Fruits	≥3 portions a day	120-200g	120-150g	120-150g
Olive oil	3-6 portions a day	10ml	10ml	10ml
Dairy products	2-4 portions a day	200-250ml milk 200-250g yogurt 40-60g mature cheese 80-125g cottage cheese	250ml milk 125ml yogurt 30-40g mature cheese 80g cottage cheese	250ml milk 125ml yogurt 30-40g mature cheese 80g cottage cheese
Fish	3-4 portions a week	125-150g	100-120g	140-150g
Lean meat	3-4 portions a week	100-125g	80-100g	120g
Eggs	3-4 portions a week	100-125g	60-120g	60-120g
Legumes	2-4 portions a week	60-80g	60g	80g
Nuts	3-7 portions a week	20-30g	20-30g	20-30g
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	200ml approx.	250ml approx.	250ml approx.
Beer or wine	Optional and moderate	50-100ml wine 100-200ml beer	-	-
Physical activity	Daily	≥30 minutes	1 hour	1 hour

Source: <sup>1</sup>SENC (2004), <sup>2</sup>PERSEO (2007).

### 2.1.2. The Spanish Healthy Food Basket

In common with the Belgian Food Basket, the Spanish Healthy Food Basket has not the purpose to prescribe what people should eat, but to establish a budget threshold below which healthy eating is not possible. Delicacies such as cakes, crisps, biscuits, take-away meals or eating out will not be included in the healthy food basket, but will have a place in other baskets as 'entertaining social relations', 'safety in childhood' and 'recreation and leisure time'. Alcohol for social consumption will also be considered within these other baskets, but unlike the Belgian Food Basket we have included in the Spanish Food Basket the optional amount of wine and beer contemplated by the Spanish Healthy Eating Pyramid.

Since different foods from the same food group do not contain the same types and amounts of nutrients, variation within the different food groups is necessary. To guarantee this balance among the various foods for adults, we followed the frequencies of consumption recommended by the Spanish Agency of Food Security and Nutrition, along with the Spanish Society of Community Nutrition, and for children and adolescents, we relied on the nutritional objectives laid down in the Guide for Families from the PERSEO program (see table 4). For women, we took the lower threshold as a reference, while the upper one has been applied to men. For children, since recommendations are given for age intervals (6-10 years old and 11 to 14 years old), the upper reference has been used in both cases (boy 10y-old and girl 14y-old).

As a rule, those foods that according to the Spanish National Survey on Nutritional Intake are consumed below the recommendations, are promoted in front of those whose intake is excessive. For example, as we wish to compose a balanced food basket for a minimum budget, as a rule, the cheapest option is selected from the available preferential products. For instance, although olive oil is the recommended fat in Spain due to its benefits for cardiovascular health and the fact that is highly produced in our country, we have also included in the fat group little amounts of sunflower oil (for being a cheaper fat) as well as nuts (for being consumed below the recommendations).

For the determination of the quantities of the various food products for different age groups, we started from the amounts mentioned in Table 4. For fresh fruits and vegetables we increased the net amounts with a waste percentage of resp. 22% and 28%. For fresh fish it was increased in a 30% and fatter meat in a 20%. We have not considered any waste percentage for lean meat, since it is very common in Spain to buy it ready to cook. When it is not the case (i.e. when buying an entire chicken), the price per kilo is always cheaper, so the final price is similar.

In order to compose well-varied baskets of fruits, vegetables, meat and fish, we chose for including at least seven different food products per week. 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 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.

With a view to the acceptability of the reference budgets to individuals on a low income, we took account of certain remarks in the focus groups insofar as they were not incompatible with existing recommendations. We consecutively compiled food baskets for adult women, adult men, primary school age children (6-11 years) and adolescents (12-17 years).

By adding up per 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. As it is highly impractical to frequent different shops for regular purchases such as food, a choice was made for combined purchases from a single supermarket chain namely "Mercadona". This choice was made upon a study of the Spanish Consumers' Association (OCU, 2012), in which the different retailers in Spain were analysed and compared in different ways: a "basic basket" (which included white brands), a "typical basket" (that compared products of exactly the same brand and package), and a "fresh basket" (which included fresh vegetables and fruit). This comparison was made country-wide and also for the main cities in Spain. After studying the different possibilities, Mercadona, was selected for being a retailer wide spread across Spain and with prices in the three baskets being 10% more expensive than the cheapest one, which gives a little margin. Besides, is a retailer very convenient in almost every city in Spain, because it is inside the cities themselves -while Carrefour or Alcampo, which have slightly lower prices are normally in big shopping areas at the outskirts, not being easily reachable for all people, especially non-car owners.

In addition to a healthy diet, physical activity is very important for a good health and to maintain the energy balance. With physical activity, moderate efforts are meant that let heart beat faster, breath slightly faster than normal and sweating lightly. Daily activities for 30 minutes (60 for children and teenagers), including walking, cycling and housework can be mentioned in this context. Because of that, it was suggested to include a budget for paid physical activity in order to bring some variations in the physical activity group. However, paid physical activity options in Spain [Barcelona] are quite expensive (73-78€/month the whole family or 41-45€/month for the adults) (Ajuntament de Barcelona, 2013). Thus, as proposed by the focus groups, we opted for not including paid physical activity options (like swimming pools or gym entrances) with the understanding that families and individuals can engage a number of free activities regularly, given the availability and favourable weather to develop them outdoors.

Finally, we included the necessary kitchen equipment to conserve, prepare and eat the various food ingredients. As may be seen, we included a freezer, whose size varies on family size. The inclusion of a freezer is essential because it not only allows families to buy their food more economically (frozen foods are often cheaper than fresh) but it also allows families to deal economically with leftovers. Families who do not have a freezer are obliged to spend to at least 10% more on food. Having a microwave was considered as non-essential by the focus groups, but it was finally included to guarantee consistency with the rest of national reference budgets.

## 2.2. THE CLOTHING BASKET

In this section the adjustments made in the Barcelona's clothing basket are described and justified. The text is divided in seven parts:

The first one focuses on details about the influence of the weather conditions on the choice of clothing items. The second section explains in detail the choice and number of clothing items. We justify the adaptations made regarding the "items", the "number of items" and "function" according to Barcelona's climate conditions and cultural habits in harmony with the common criteria agreed for men, women, boys aged 6-11 and girls aged 12-17. In addition, in the third point, we discuss the items included for "maintenance, storage and repair" of clothes and shoes.

In sections 4 and 5 there are some recommendations about which fabrics are more adequate to guarantee a suitable quality for clothes and shoes and some information about clothing consumption patterns in our context. Both elements will be necessary to take into account in order to complete the last step: the pricing process, described in section 6.

### 2.2.1. Barcelona's weather conditions

Spain is a country of 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) and Mediterranean, which is the one that predominates (Borràs & Ubach, 1991). Other microclimates can be found, such as alpine climate in the Pyrenees and subtropical in Canary Islands.

Particularly, Barcelona has a maritime temperate Mediterranean climate. Winters are very mild and dry, where rarely snows or frosts. The coolest month is January, where the average temperature is 8,9°C (AEMET, 2013). Spring and autumn are the seasons where the weather is more unstable and precipitations take place, although temperature is also very soft. Summers are hot (July and August are the hottest months with an average temperature around 23-24°C, (AEMET, 2013))<sup>2</sup>. However, due to high levels of humidity summers are very sticky, particularly at night (Moran i Ocerinjuregui *et al.*, 1982).

Considering the previous description, Barcelona's climate is mild. But, because of the exposure to polar or Siberian air masses, 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 from activities foreseen in other baskets. In this sense, the

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<sup>2</sup> The Agencia Estatal de Meteorología (AEMET) has published a report with specific climate data for Barcelona for the period 1971-2000. We can underline the following values: average annual temperature: 15,5°C; average annual rainfall: 640 mm; average relative humidity: 72%.

types of items are very near to the ones proposed in the Belgium basket. Nevertheless, the discussion of some elements of the clothing basket with the participants in the focus groups assure that the items and amount chosen reflects the needs and cultural habits of the population.

### **2.2.2. The number of items of clothing**

A specific guideline to establish the adequate number of items of clothing per person has not been found 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, 2005). It is estimated that on average approximately 2 items of clothes per month and person are bought in Spain (includes the wide variety of items, from socks to coats). Since the beginning of the economic crisis in 2007, according to this report, the consumption of clothes has decreased, but it is higher than in the nineties (CRIC, 2012a). In a context with high levels of consumption of clothes, it is difficult to fix the minimum number of clothes needed not only to protect against weather conditions, but also to participate in society and develop a personal identity. 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 order to complete the theoretical expert part for the clothing basket we interviewed social workers, socio-educative professionals and sisters involved in charity organizations<sup>3</sup>. The purpose was to explore if they had theoretical or practical references to deal with this question. Some of them had started to create internal guidelines regarding this question based mainly on

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<sup>3</sup> The professionals interviewed were from the same charity organization 'Daughters of Charity of Saint Vicent the Paul', but specialized in taking care of people of different sex and ages in Barcelona and metropolitan area: 1) *Obra Social de Santa Lluïsa de Marillac. Centre d'estada limitada (C.E.L)*: a centre to take care of adult men in a situation of social exclusion that need social support and recovering from a disease; (2) *Llar de Pau. Centre d'estada limitada (C.E.L)*: a centre to take care of adult women in a situation of social exclusion, that need social attendance and support to recover from a disease. In both services provided people with a minimum of 3-4 change of clothes and underwear in case they have not any resources. (3) *Residència La Immaculada. Centres Residencials d'Acció Educativa (CRAE)*: it is a children's home, a centre that takes care of boys and girls aged between 2 and 15 years old. In this case the guideline was more developed. We followed their orientations regarding clothing items, but also their advice about the number of certain items (coats, sport clothes and shoes for children); They fixed 7 change of clothes in autumn-winter season and 10 for spring/summer (4) *Residència Sol Ponent. Obra Beneficoassistencial*: it is an old people's home. In this last case, although the social condition differs from the ones in the study, the guideline was also very accurate. We should highlight that the minimum clothing items needed in that context was established considering that elderly people should have clothes for different occasions, although being in an old people's home. It also helped us to know the different clothing items considering seasons (the minimum was 4 changes of clothes/per season). We thank for their collaboration: Eduard Sala, David Vázquez, Sor Maria Peña from *Obra Social de Santa Lluïsa de Marillac*, Albert Sabatés and Olga Valsells from *Llar de Pau*, Sor Isabel Bugés from *Residència La Immaculada* and Pilar Jiménez from *Residència Sol Ponent*.

the common sense criteria from their daily practice and experience: the need to guarantee a high level of hygiene (laundry every day or 2-3 times per week), a very 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 this organizations take care of people with a particular social situation differently from the one supposed in this study (man and women between 35-45 years old and boy (6-11 years old and girl (12-17) who live in households, in good health), a clothing budget is needed in these contexts, particularly, to protect against weather conditions and essential for the self. This is why we thought their practical considerations based on their daily experience regarding what clothing items were relevant in our context in concordance with weather conditions and cultural habits could be useful information to make the necessary adjustments in the list. Conversely, in the study the number of items of clothing responds to the premise that there are ten days between wear and “rewear”, particularly, for “underwear”.

Finally, the clothing basket is developed for both working and non-working people using the same amounts. 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 working. 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.

In the next paragraphs, we describe the composition of the Barcelona’s clothing basket. We start from the common criteria cross-country agreed and the Belgian clothing basket proposal and we modify it according to the Mediterranean weather conditions explained above, expert advice and arguments obtained from focus group discussions in our country.

### **Coats**

For man and woman we considered 3 Coats:

- 1 “heavy coat”: more functional, to effectively protect against cold.
- 1 “rain jacket with zipper and hood”: waterproof, windproof, supple, breathable, must serve for all seasons.
- 1 “sport vest”: smart clothes, more formal, timeless.

In this case, we provided with coats either suitable for formal or informal occasions and variance of clothes is ensured because rain jacket and sport vest can be used during mid-season period as being a lightweight jacket.

Children were equipped with 4 coats: Winter Coats is doubled (2 “winter coats” for the boy aged 6-11 and 2 “heavy coat” for the girl 12-17). For the mid-season we included also to provide with variance: 1 “rain jacket with zipper and hood” and 1 “lightweight jacket”.



In any case, “rain jacket” and “fluorescent jacket” were taken into account considering the premise that families take public transport, or go by bicycle or on foot. “Fluorescent jacket” is included also because it is seen as a security item in Spain when going by car or bicycle<sup>4</sup>. In addition, 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)<sup>5</sup>.

### ***Pants, Dresses and Skirts***

We provided light and heavy variants of trousers. The result is that there are pants for the different seasons; people have variance of choice (more than 2 pieces of pant/dress or skirt is available per person & season) and also there are clothes for formal and informal occasions. The total number of pants, bermudas, dresses and skirts for each member finally was: man (8); woman & girls (16) and boy (10).

### ***Tops: Shirts & T-Shirts***

According to the Belgian proposal this section was composed by “Shirts” and “T-Shirts”, where “Shirts” were foreseen for more formal occasions and “T-Shirts” for everyday use and for more multifunctional use. Shirts are lightweight wear, so are worn all along the year and can be combined with “t-shirt”, “undershirt” or also with a “sweater” if necessary in case of cold weather.

Shirts are maybe more adequate for women and men. Moreover, shirts made of cotton or linen could help a better perspiration in summer. Also due to the hot weather in the Southern Mediterranean countries 1 more “long-sleeve shirts” and 3 more “short-sleeve shirts” were added in comparison with Belgium (man; woman).

In the case of “short sleeve t-shirts”, 8 t-shirts makes sure people are able to change every day (man, woman, girl); for boys we provide 13 short sleeve t-shirts (10 “normal”+3 to play) these proportion also guarantee that children could have sufficient items for outdoor summer leisure activities (for example one week in a summer camp – foreseen in the safety in childhood basket).

### ***Sweaters***

As summer’s days are very hot, we removed “light sweaters”. Instead we increased the amount of “cardigans” (2 pairs) for men, women, boys and girls to protect against cold or wind when temperature decreases, particularly, at night. It can also be useful to wear on formal occasions or activities outdoors at night. It is also convenient to protect people from temperature changes due to air conditioning in buildings and public transport.

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<sup>4</sup> See: [http://ec.europa.eu/transport/road\\_safety/going\\_abroad/spain/other\\_es.htm](http://ec.europa.eu/transport/road_safety/going_abroad/spain/other_es.htm)

<sup>5</sup> See: <http://www.dgt.es/es/prensa/notas-de-prensa/2014/20140410-Presentado-el-dispositivo-especial-de-Trafico-para-la-Semana-Santa.shtml>

For winter season we included 3 different types of sweaters to combine depending on formal or more informal occasions: “fleece sweater”; “heavy sweater multifunctional”; “heavy sweater smart clothes”. The same for boys and girls, but for the “heavy sweater multifunctional” the amount was doubled in the case of girls and multiplied by 3 in the case of boys, because when playing children get dirty easily and it is important to have this variety that permits to change clothes in case this happens.

### ***Sport Clothes***

We provided “tracksuit (includes pant and jacket)” suitable for the autumn-winter season for outdoor or indoor activities.

We included also a “t-shirt” and “short” more adequate for spring-summer time use or indoor activities in winter. Also we included a “swimsuit”.

In the basket “safety in childhood” there is included one more tracksuit and one more swimsuit for boys and girls linked to the weekly participation in sport activities (gymnastics at school and leisure activities, particularly, during summer time). Sport clothes become easily sweaty and it might be no time to wash and dry between activities.

### ***Underwear***

We considered “under-shirts without sleeves” not only for boys (6 items), but also for men (4 items), women (4 items) and girls (4 items).

Under-shirts might be useful because temperatures are in general very soft and a sweater could be very warm, particularly, in autumn or spring time. On the contrary, under-shirt is very close to skin and protects against cold. It is a traditionally clothing item, although it could be sub-estimated by new generations. We include it because it has the specific function mentioned above and, although Mediterranean climate could be very soft in winter cold episodes could appear and people should have the resources to be protected.

Considering summer pyjamas, a “nightdress” might be more adequate for women and girls, according also to high temperatures during summer season.

### ***Socks***

In summer “socks” are not really essential according to weather conditions. Open shoes (sandals) are the ones mainly worn during this season, particularly, for women, boys and girls. 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 we estimated 5 pairs of “summer socks” (for man, woman, boy and girl).

In the case of “winter socks” we included 10 socks that might be lighter than in coldest countries. However, the amount responds to the need to change one’s clothes according to the initial premise: *“the number of items of clothing responds to the fact that there are ten days between wear and “rewear”, particularly, for “underwear”*”. In addition, in winter more time to dry is needed (taking into account that in this research we suppose that model families do not have drying machine (see **section 2.2.3**). For summer, then, it is coherent to include only 5 socks (because as explained before it is less common and the drying process is faster).

According to the fact that “pantys” are lighter and “leggings” are warmer and that not every day skirts or dresses are worn, because the clothing basket includes pants as an alternative option, we included the following amount: 2 pantys and 2 leggings. During summer time there is the possibility that light dress and light skirt could be worn without “pantys” according to the Mediterranean climate.

### **Accessories**

For women and girls we provided a “foulard” to protect from cold and wind, specially, in spring or summer seasons, when the weather is changeable and to wear a scarf might be too warm. It is an item that has a multifunctional character, so it can serve for informal or formal occasions combined with smart clothes.

Other accessories that we included in the clothing basket are:

- 1 “wallet” (man, woman, boy and girl)
- 1 “hand-back” (woman and girl)
- 1 “bag/backpack” (man, woman, boy and girl): one for every child and one per two adults.
- 1 “weekend bag/suitcase” (man, woman, boy and girl): one per two children and one per couple.
- 1 “folding shopping back”: one per adult

These items must be suitable for all seasons (leather or a washable fabric).

- 1 “umbrella” (man, woman and girl). We understand that the boy uses rain coat and also parents’ umbrella.

### **Shoes**

Chiropodists have established certain guidelines for shoes to guarantee healthy feet. Particularly, it is better to avoid closed toe and high heels. The heel must be between 2,5 and 4 cm and moderately used. Flat forms are more recommended (Ferro, 2012). There are also specific guidelines to choose children shoes, which should be flexible, lightly, 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).

Regarding slippers we suggest 3 kinds of slippers to include in the basket for men, women, boys and girls, because slippers worn at home are not usually used outdoors:

- "Flip-flops slippers" (waterproof and hygienic): mainly used to protect your feet when participating on activities in the gym, the swimming pool or the beach.
- "Winter carpet slippers" (anti-slip, warm and hygienic): to be worn at home in winter (indoor).
- "Summer carpet slippers" (anti-slip, help to absorb perspiration and hygienic): to be worn at home during summer season (indoor).

"Gym slippers": are very specific kinds of shoes for playing gym. We did not include them in this basket. In general, sport activities (also at schools) are done outdoors due to favourable weather conditions. So, trainers can be used instead.

"Gummy boots": we eliminated this item for man, woman and girl. We only included this item for children to play outside or when going hiking in the forest, also used when it rains.

We included for each family member a variance for shoes according to climate conditions. For "winter shoes" and "trainers" we provided only one pair for man and woman. For summer 2 pairs of "summer shoes" (mainly sandals) were included for man and woman, because of the hot weather and sweat it is more comfortable to have the possibility to change shoes. Dressing shoes suitable for all seasons were included for man, woman and girl, possible to worn with or without socks or panty, suitable for all seasons. In the case of the boy (6-11 years old) we included "shoe to play" as a comfortable shoe to horse around and play, at this age no formal shoes are included. For children and girl we include one more pair "trainers". Trainers can be worn all along the year, so are taken into account also as a summer shoe and also suitable for sport activities all along the year.

### 2.2.3. Maintenance, storage and repair

Considering the maintenance and storage, there are some guidelines that establish how to keep, take care, wash and dry clothes. These recommendations are oriented to lengthen the life span of clothes (CRIC, 2012b). Despite some guidelines exist, it is difficult to know which are the real practices and habits of people. So, we started from the Belgian proposal and we asked unsure elements in the focus groups discussions (see the results below).

Figure 6. List of maintenance, storage and repair items.

<b>MAINTENANCE (clothes)</b>		<b>Details</b>
washing machine		
washing powder		suitable for all fibers
stain remover		suitable for all fibers
ironing board		iron width > 30 CM, adjustable
iron		
clothes horse		
Clothespin		
laundry basket		
<b>STORAGE (clothes &amp; shoes)</b>		
wardrobes		
hangers in the wardrobe		10 pp.
rack for coats		1 hook per person
Shoe Cabinet / Rack		4 p shoes
		8 p shoes
		12 p shoes
		16 p shoes
chair		1 per p
<b>MAINTENANCE (shoes)</b>		
black Shoe polish		one per family
brown shoe polish		one per family
Neutral shoe polish		one per family
brushes		one per family
laces		one per family
<b>REPAIR (clothes &amp; shoes)</b>		
sewing		thread, needles, elastic, knee patches, button
new heels and soles		to enlarge the choice regarding shoes

After focus groups discussions the following items for maintenance and repair of shoes were not seen as items to be included:

- **Waterproof Spray**, it was seen as a product not absolutely necessary to clean shoes. Some participants did not know what it was.
- **New heels and soles**: the argument was that normally heels and soles are changed by a specialist. So, we include the cost of going to a shoe maker.

About maintenance of clothes focus group discussions concluded the following:

- **Sewing machine**: might be used to repair clothes at home, but the argument was that people should have competences in order to use it and the sewing culture is diminishing nowadays (see expanded explanation in **section 2.2.5**).
- **Drying machine**: natural drying is very common in Spain because of the favourable climate conditions. In general, buildings are equipped with an exterior washing line. However, clothes horse will be included because clothes could be dried inside home (due to bad weather) or outside in a terrace.

We also asked about **natural products** and **covers or boxes** to protect not seasonal clothes, as it is something recommended in our context by guidelines (CRIC, 2012b), especially when you have old wardrobes, but focus groups participants concluded that it was not seen as something necessary.

#### 2.2.4. Suitable quality and fabric recommendations

The recommendations<sup>6</sup> to decide the most adequate fabrics to use are the following:

- Natural fibers are the most convenient ones especially when considering clothes in contact with skin.
- Among natural fibers cotton is the most appreciated. Linen and silk are ideal for high temperatures. Artificial fiber made of cellulose, such as viscose is also cooler than cotton, but less resistant.
- Natural fibers (cotton, wool and linen) can gain resistance if they are mixed with a small quantity of polyester, around 20% (for example, for items that need to be washed more, such as underpants or work uniforms, in general made of cotton).
- Other natural fibers such as silk, hessian or bamboo are very resistant, although there are very special items made of these materials.
- Synthetic fibers are more resistant, especially polyester, acrylic, polyamide or nylon. However, these fibers do not permit perspiration. It is recommended that the tissue has only 50% maximum of this material. However, there are some items of clothing that synthetic materials are needed, such as swimsuits (with elastan) and waterproof jacket (with polyamide).
- For shoes it is also recommended natural fibers that ensure perspiration, essential for children, and to avoid PVC or polyurethane or toxic substances.
- *Oko-Tex Standard 100* is a European label also used and recognized in our territory that certifies that there are no harmful substances in the textile products.



#### 2.2.5. Clothing Consumption patterns

In order to elaborate the clothing budget took into account the shop preferences of the participants in the focus groups (see next section). However, the information below about clothing consumption in our context could be useful in order to know the clothing consumption patterns in our culture.

The **sewing culture** is disappearing in Spain (SETEM, 2005). There is the possibility that self made production of clothes might be coming back in this context of economic difficulties. Participants in focus groups argued that it is impossible to produce own clothes because you need to have time and competences to do that, but also because the final price would be more expensive in comparison with the direct purchase of clothing in shops. However, on the other hand, participants agreed that simple maintenance that does not require big competences is

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<sup>6</sup> Information based on CRIC (2012a) and Ajuntament de Barcelona (2008).

usually done at home. Home maintenance is done now more because of the crisis context and also as an educative 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, 2005). In the focus group discussions some participants suggested that this practice is only restricted for certain kind of clothes, such as jackets. 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 little children clothes (not among teenagers). Moreover, this practice is restricted to clothes that have been less used and are still in good conditions. However, according to the common criteria in the study, these practices are not taken into account because freedom of choice might be limited, which is believed to be essential even in a minimum budget. In addition, it is difficult to assess the general impact of these practices in our society and to estimate the amount of money that families could save on clothing when doing this practice.

#### **2.2.6. Methodology for pricing the clothing basket**

In this section the pricing process is explained: first of all, the choice of the shops where clothing items, maintenance or storage items and washing products will be priced. Secondly, the criteria and steps followed to do the final pricing.

##### ***Choice of shops: clothing, maintenance & storage and washing***

Data from a survey about Barcelona citizens' shopping habits reveals that in 2010 about fifty per cent of respondents still prefer specialized shops or neighborhood shops to purchase clothes and shoes rather than malls or big stores; however, this is becoming a downward trend. What is more, the results of the poll shows that this preferences change with age: young people tend to go to malls and big stores and as people grow they prefer specialized or neighborhood shops (GESOP, 2011). The choice of shops is linked with preferences about quality or quantity of clothing items. In this sense, participants in our focus groups agreed that variation is important, so they would rather buy more economic 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 common shops repeatedly mentioned in the focus groups in relation to this requirement were H&M, Zara, Decathlon (for sport clothes and some accessories) and Ikea for maintenance and storage material. About the possibility to purchase cheaper clothes in big supermarkets such as Carrefour or Primark they said that clothes from there have less quality and, so items last fewer. According to this argument the shops mentioned above were the ones used for the pricing process. These shops are also wide spread in Barcelona city.

Regarding washing products, they were priced in the same supermarket chain used for food: Mercadona. We understand that this is also reasonable for families in terms of the organization



of quotidian life and economization of time to tend to buy washing products in the same supermarket chain where they buy food.

### ***Pricing procedure***

- We did the pricing exercise through shops' website.
- We chose the item with the price that allows people to choose between three different pieces.
- We did not take discounts or sales prices.
- We also chose the items that had a suitable quality according to recommendations in **section 2.2.4** and materials that are machine washable. This information is registered in columns "labels" and "ISO norm" in the Excel document).
- Regarding life span, in general, children clothes are foreseen to last only for a period of 1 year because of the growing process, except for some items that last 2 years (the case of items that could be one size bigger: coat, pyjamas, undershirts, gummy boots...) or even more, from 3 up to 10 years, such as some accessories, bath robe, bag or suitcase. For man and woman the average life span of items is generally between 2-3 years, except for clothing items and accessories that are less used and so last longer.
- 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, we discount a 10% on the price, and it was multiplied by the amount of the item and divided by the life span in years. The figure obtained was divided by 12 (referring to months) and, so the monthly price emerged.

### 2.3. THE PERSONAL CARE BASKET

Because of a lack of national guidelines with criteria on personal care, the Spanish personal care basket has been developed by means of an expert<sup>7</sup> validation of the Belgian basket and the principles that uphold it, which means that the health expert has considered whether or not the essentials for adequate hand hygiene, oral hygiene, general hygiene and contraception described in the first part of this document were also applicable to the Spanish context and, if so, whether or not the list of products included in the national personal care basket would remain the same.

Being so, our expert considered that the same principles are suitable for Spain, given the environmental and cultural characteristics and so are the goods included in the Personal Care basket.

After the focus groups, however, some adaptations were made. Our expert suggested considering waxing as a hair removal method for women, since it is more common in Spain. This was checked in the focus groups, and although all the women asserted they preferred waxing rather than razor blades, in this case the price criterion prevailed over the cultural preference. Thus, shaver and razor blades were included under the same criteria used in the Belgian basket.

The student discount at the hairdresser is not very frequent in Spain, hence for the teenager girl the haircut was priced as an adult.

Finally, body lotion, hair dryer, hair color for women, ribbons, tissues, a bathroom mat, a toilet brush a mug for tooth brushes, a shower curtain and a toilet bin were added in response to the arguments in the focus groups as well as for comparability reasons with the rest of the countries.

When possible, the same stores than in the food basket were used to price the Personal Care basket items.

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<sup>7</sup> Many thanks to Dr. Emilia Sanchez Ruiz.

## **2.4. THE HEALTH CARE BASKET**

### **2.4.1. Organization of the Health Care Spanish Service and Insurance costs**

In Spain, the competencies related to the organization, functioning, evaluation and control of the Health services, centres and institutions are transferred to the autonomic government. This is important to be stated here because although all autonomic governments in Spain go along the same lines, there may be some differences that make the following lines not completely applicable to the rest of the Spanish regions.

In the case of our “city-case”, Barcelona, the Generalitat de Catalunya is the main responsible for the decisions related to health through “CatSalut”, the Catalan Health Service, which is the public body that guarantees the right of health care protection for all citizens in Catalonia. There are 400 centres of primary health care and 68 hospitals for public use, irrespective of its ownership. It is therefore a mixed health model that integrates all available resources into one network.

The Spanish Health System is universal, which means that guarantees medical attention to all Catalan citizens, assigning a specific level of coverage depending on the personal conditions. This level of coverage determines the level of benefits that a person receives. Regardless of the level of coverage, 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 to physically pay for them (they have already contributed with their taxes).

Prescribed medicines have a certain rate of co-payment, depending on the specific drug and the total income of the individual or head of the household. However, certain collectives are exempted of making any contribution, such as individuals (and their beneficiaries) with a disability degree higher than a 33%, individuals receiving treatment for a work-related accident or disease, non-working individuals without social perceptions and those receiving non-contributive pensions and certain social perceptions.

In addition to the public insurance, some individuals and families choose to have a double coverage, by taking out a private health insurance. In the totality of Spain, a 12,5% of the population has this double coverage, whereas in Catalonia this amount increases up to the 26,5%. Surprisingly, a 10% of the Catalan population characterized as “lower social class” (considering the individual's occupation or, if none, the head of the household's occupation), has double coverage (Spanish Ministry of Health, Social Services and Equality, 2011; Generalitat de Catalunya, 2012). In this basket only public health coverage has been taken into account, since we are looking for a minimum budget and the fact that the public insurance is wide and good enough.

Also in Spain, the GP is the central figure in primary health care. As it occurs in Belgium, the GP not only treat diseases, but he/she also plays a crucial role in primary, secondary and tertiary prevention. In the Spanish healthcare patients cannot visit a specialist without a referral from a GP, unless they have a private health insurance, so he/she also plays a role of “gatekeeper”.

The list of goods and services included in the Spanish Health Care basket was determined through an expert validation of the Belgian basket for the specific characteristics of the Spanish context, assuming that the same principles developed in the first three sections of this chapter are also applicable. In this case, the expert validation has been possible thanks to Emilia Sanchez Ruiz, M.D., Ph.D., who has kindly provided her expertise to the project.

Thus, the costs of the Spanish Health Care basket was calculated as follows.

### ***For individual counseling***

- 4 consults a year for the 10 years old boy + 2 home visits
  - 3 consults a year for the 14 years old girl + 1 home visit
  - 2 consults a year for both adults + 1 home visit
- All of them have a 0 cost for the individuals and families.*

For the advice and the prescription in the case of an acute earache:

- 1 consult a year for the 10 years old boy + the purchase of an antibiotic
- Only have the cost of the antibiotic.*

### ***In case of injuries***

- 1 consult every 5 years for the children
  - 1 consult every 10 years for the adults
- All of them have a 0 cost for the individuals and families.*

### ***Medical prevention***

The following vaccines and cancer prevention activities, which are part of Spanish prevention programmes.

- Children: Difteria, tetanus, pertussis, polio, Haemophilus influenzae type b, hepatitis B, meningococcal disease, measles, rubella, mumps and varicella, according to the national vaccination calendar.
  - Pre-adolescents girls: Human papilloma vaccine for the adolescent girl (Gardasil), which is freely provided at 6<sup>th</sup> grade at school.
  - Adults: 1 diphtheria-tetanus vaccine for all adults every 10 years
- Cervix cancer screening: one start screening and one follow-up visit every 3 years for every woman between 29-65 years old
- Mama cancer screening: one screening every 2 years for every woman between 50-69 years old.
- Colon cancer screening: one screening for every adult between 50-69 years old.
- The last two do not fall into our age criteria for adults, but anyway would be recommended and freely provided.*

### ***Contraception***

- Here we include the price of the contraceptive pill (Neogynon) and the price of condoms (30 per person older than 12/year). Here we included the cost for the prescription of the pill by a GP. We calculated a doctor's visit for the first time that a girl or a woman wishes to use the pill. Three months later, a second, follow-up consultation should be provided. Thereafter an annual check is sufficient. Therefore, we included 2 visits during the first year for each adolescent girl and for every woman and later on: one visit a year.

### ***Dental care***

- Spanish citizens have to pay for the recommended annual preventive oral examination. Besides that, we calculated the cost of a tooth filling in case of dental caries for each adult and for the adolescent girl on a five yearly base.  
In Spain odontologist prices are subject to a free market policy, so the cost of these services have been taken from a study conducted in 2004 by FACUA's watchdog organization.

### ***In the medicine chest we include***

- Nurofen (Ibuprofen) (for pain and fever) for both adults and children
- Sun lotion for all family members
- Immodium (Gastroenteritis) for all family members
- Waterproof anti-allergic sticking plasters (for all family members)
- Steri-strips to close small wounds (for all family members)
- Sterile compresses (for all family members)
- Bandages (for all family members)
- A cold pack (per family)
- a pair of stainless tweezers (per family)
- a pair of stainless scissors (per family)
- an antiseptic (per family)
- an ointment for minor burns (per family)
- a box of safety pins and bandage clips (per family)
- a lice comb (per family with children)
- an anti-lice drug treatment (per family with children)
- a thermometer (per family)
- A tick remover (per family)
- Insect repellent (one per family, except for 4-member families who need 2).

## 2.5. THE REST AND LEISURE BASKETS

### 2.5.1. Refreshing sleep

Due to the lack of national guidelines with regard to rest conditions, the Spanish rest basket was developed by means of an expert<sup>8</sup> validation of the Belgian basket and the principles that uphold it, which means that a physiotherapist has considered whether or not the essentials for refreshing described for the Belgian context were also applicable to the Spanish context. Our expert considered that the same principles are suitable for Spain, and so are the goods included in the rest basket:

- A combination of a bed frame, a slatted base and a mattress (35 kg / m<sup>3</sup>, 15cm) in the form of single beds for children older than two and double beds for adults.
- A four season duvet, along with two pillows and two sets of mattress protector for every person.
- We also included a simple folding bed in case of visitors.

The pricing of these items was calculated using multinational retailers in order to facilitate cross-country comparability.

### 2.5.2. Leisure and Recreation

In the absence of quality guidelines, we started from the Belgian proposal for the leisure and we adapted it to the Spanish context using the arguments collected in focus groups around this subject.

#### 2.5.2.1. Holidays

More than six out of ten Spanish spent at least one night away from home when travelling for work or private purposes in 2012 (64%) according to the *Flash Eurobarometer Report n° 370* (European Commission, 2013:50). This rate is 7 points below the average of the European Union (71%).

However, on the other hand, the survey reveals that six out of ten Spaniards respondents said that they did not go on holiday for financial reasons (56%) in 2012, (European Commission, 2013:60), 10 points over the average of the European Union (46%). Moreover, according to data from the *Encuesta de Condiciones de Vida (ECV, 2012)*<sup>9</sup> published in 2012 by the Instituto Nacional de Estadística (INE), 44,5% of Spanish households could not afford a week of holidays

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<sup>8</sup> Many thanks to Lluís Puig, physiotherapist.

<sup>9</sup> ECV is an annual statistics report produced by INE, since 2004, with the objective to obtain data about households' income, inequalities, poverty, social exclusion and social cohesion at national level (Spain). ECV's statistical operations are harmonized with EU-SILC from Eurostat.

away from home and 39,8% in Catalonia region (INE, 2012:7-8). In 2012 this indicator has reached the highest rate since 2006.

Like in the Belgian context, it is reasonable to consider that a five-day domestic holiday trip (Monday-Friday) in summer is necessary for an acceptable living standard. The question was asked in the focus groups and the majority of participants found a five-day family holiday in summer – away from home - acceptable. 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 in Christmas and approximately ten additional days in Easter term. For these reasons, there are other opportunities all along the academic year to go on day trips. This other possibilities will be included in the Safety in Childhood basket.

The items included for ***going on a five-day domestic holiday trip (4 nights) away from home*** were the following:

### ***Accommodation***

Regarding the accommodation, statistical data from Instituto de Estudios Turísticos (2012) show that going camping or use a caravan is not a very common accommodation option among Spaniards (6,8%)<sup>10</sup>. In the FGs discussions the “camping” option was seen as an expensive one and also requires a car. Another feasible option for the participants was to spend holidays to a friend or family house. In fact, according to the same statistical source 39,8% of the domestic tourism trips respond to this type of accommodation option. Although this option is the most common, in order to guarantee cross-country comparability between the budgets, we agree on taking a vacation less dependent on relatives and friends and that provide 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 data, 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* in order to estimate the price for the stay at the Hotel. According to this analysis the Spaniards spend in the first half of 2011 on average 76€ per night/bedroom in Spain (2011, p.26-27)<sup>11</sup>.

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<sup>10</sup> Percentage of domestic tourism trips depending on the type of accommodation (2012): 39,8% Free accommodation (family or friends); 29,2% own dwelling; 17,8% Hotel; 6,4% corresponds to rented dwelling and finally, only 6,8% under the category others (camping, caravanning, specialized, countryside house and others). Percentages based on absolute numbers published by the Instituto de Estudios Turísticos (2012).

<sup>11</sup> Although the he report uses only Hoteles.com database, the analysis is based on real prices paid during the period January-June 2011 in different cities of the world. In addition, this edition of *The Hotel Price Index (HPI)* makes a deep analyses of the domestic tourism trips among Spaniards, so it is interesting to take into account this information.

### ***Travel Costs for going on Holidays: Train tickets***

We include a train return ticket for adults and children for going on holidays. This amount was included in the Mobility Basket.

### ***Food on vacation***

- The cost for food (a budget to take one warm meal in a bistro): small meal / menu (Monday-Friday): 10 € adult; 6 € for children.
- A budget that represents 15% of the price for food

### ***Others***

- A budget of 2 euro per person to spend as one pleases

### **2.5.2.2. Participation in leisure activities**

#### ***Adult association***

Catalonia has a wide network of associations, particularly, in the field of leisure and culture, whose origin is set in the XIX 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<sup>12</sup> (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, FGs said there are a lot of freely outdoor activities where people could participate without taking part of an association. Another point is the problem to find an average cost of this participation because there are a wide variety of associations. Therefore, we provided a minimum budget to spend freely that allow people to participate in socio-cultural activities along the year. We took the Belgian amount (28€ adult/per year).

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<sup>12</sup> The information source is *Enquesta de Condicions de Vida i Hàbits de la Població 2011* (ECVHP 2011). ECVHP 2011 is the second edition of a survey with a representative sample for Catalonia and Barcelona. The survey gathers information about the social and economic situation of Catalonia's households every five years. It gives specific data of the city of Barcelona and its metropolitan area nearby.



### **Cultural life individually**

Concerning the cultural life we foresaw a sum of money that allows adults going out 6 times and 6 times in a cultural event ( $2 \times 6 = 12$  times a year (once a month)). We estimated 7 € per each night out. Regarding the cultural event FGs participants argued that people should have the opportunity to experience different cultural events. For this reason, we provided budget to go to the cinema and other cultural activities (theatre plays and concerts).

For the cinema we calculated 2 times per year, a frequency agreed in FGs. The argument was that people could complement this activity watching films at home using the DVD equipment. The rest of the budget covered for participating in other cultural activities such as 2 times theatre play and 2 concerts / year. It is difficult to calculate the average price for these events because there do not exist fixed prices for these activities neither in the country or the city of reference. However, the purpose was to provide a budget that permit adults to meet this cultural function and so, we estimate 7 € for each cinema ticket and as other cultural events are in general more expensive, so we doubled the price: we estimate 14 € for each concert or theatre ticket<sup>13</sup>.

A babysitter is necessary only for a child between 6 and 10 years old. We foresaw this service only 6 nights / year; the other 6 night's parents relay on friends or relatives.

#### **2.5.2.3. Domestic leisure**

Regarding the items to be included in domestic leisure, it is interesting to consider statistical data about the presence of electronic media<sup>14</sup> in the households. **TV and Radio** are the most common media equipment; more than nine out of ten Spaniards have them at home. **DVD players** are nowadays also present in more than eight out of ten households according to the *Encuesta de Hábitos y Prácticas Culturales en España 2010-11*<sup>15</sup>. In the case of the **Radio equipment** FGs participants agreed that there is no need of this specific equipment because to listen to the radio we could use Radio channels accessible through the TV, the Mobile phone or the Internet connexion in the computer.

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<sup>13</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), see: [http://www.ara.cat/cultura/IVA-teatre-museu-cinema\\_0\\_736726506.html](http://www.ara.cat/cultura/IVA-teatre-museu-cinema_0_736726506.html)

<sup>14</sup> Regarding mobile phones will be included in the *Entertaining Social Relations* Basket in the case of adults. Mobile phones for children from 12 years on, will be included in the *Security in Childhood* Basket.

<sup>15</sup> The percentage of people that have a TV at home in 2011: 99,7% in Spain and 99,6% in Catalonia. The percentage of people that have DVD or Vídeo player at home in 2011 was 87,3% for Spain and 90,7% for Catalonia. Data from *Encuesta de Hábitos y Prácticas Culturales en España* (Ministerio de Educación, Cultura y Deporte, 2012:222-223).

In our context there is no need for **abonnement TV** because there is a considerable diversity of freely accessible channels. Likewise, a monthly tax for the cable connection or antenna (**members'ticket KWB/KA**) is not required, there is only an initial installation cost (we assumed an individual antenna). We also added a support to fix the TV in the wall and a cable HDMI for the connexion TV-DVD.

We included a small budget for snacks during domestic leisure (less than 1,5€ per month).

### ***Library***

In 2011 in Spain only 21% of people visited at least one library. Catalonia was the region with the highest percentage of people visiting libraries: 27% according to the *Encuesta de Hábitos y Prácticas Culturales en España* (Ministerio de Educación, Cultura y Deporte, 2012:202). One of the particularities of our context is the free access to the Municipal Libraries Network of the province of Barcelona. The card is also valid to access other public libraries in Catalonia<sup>16</sup>. It allows people to use all the library services (e.g. borrow books, CDs, DVDs, consult magazines, newspapers, etc) and also get discounts or advantages in some cultural events. 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.

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<sup>16</sup> See the page web of Municipal Libraries Network: <http://bibliotecavirtual.diba.cat/en/qui-som>

## 2.6. THE SAFE CHILDHOOD BASKET

To develop the Safety in Childhood Basket for Spain we started from the Belgian proposal and made adjustments according to national legislation, expert advice<sup>17</sup>, scientific literature and survey data. Particularly in this basket, focus groups arguments around this subject were also important to check the items included and be sure of their adequacy to play social roles.

Like in the Belgian context, our guideline is the *International Convention on the Rights of the Child* (1989) that has been ratified by Spain in 1990. In the nineties, both Spain (1996) and Catalonia (1995) incorporated in their own legislation the principles of the *Convention*. Since then, particularly in Catalonia, there have been several legislations (Fernández Barrera, 2012).

Our main guideline to decide the items 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* (Parlament de Catalunya, 2011). This law focuses on different aspects of children's wellbeing from an integral and holistic approach centred in 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 or tutors duty. Public authorities should adopt measures to ensure that parents or tutors have the opportunity to offer them basic level of material welfare for an adequate integral development.

### **Day trip**

It is difficult to select which activities should be included in the budget that allow parents and children to go out together.

A survey called *Panel de Famílies i Infància Barcelona* (Marí-Klose et al., 2008) shows that the main activities teenagers do together with their parents are watching TV, shopping and walking. However, in addition to this, the survey reflects a wide variety of activities developed jointly between teenagers and their parents in Barcelona in different fields<sup>18</sup>: doing sport, attending cultural events, media consumption, among others.

A recent study by Kid's Cluster (2014) reveals that the trend is to recuperate "outdoor" leisure activities to be developed together as a unique and authentic experience, where families 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

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<sup>17</sup> The experts that provide us information in order to elaborate and adapt the *Safety in Childhood basket* according to the particularities of our context are: Dr. Jesús Vilar, expert on education and child rights, Dr. Eduard Longás, expert on education and safety on childhood linked to the prevention of unintentional injuries at school; Dr. Miquel Àngel Prats, expert on education and ICT technologies, the three of them members of PSITIC Research Group at FPCEE Blanquerna-URL (Barcelona); Francesc Garreta, expert on leisure from Facultat d'Educació Social i Treball Social Pere Tarrés-URL (Barcelona); Imma Marín director of Marinva, an enterprise specialised on education, communication and training through the game (Cornellà de Llobregat). We thank all of them for their collaboration.

<sup>18</sup> Watching TV; going shopping; walking; going to the cinema, theatre or concerts; going on a excursion; doing homework; visit an amusement park; going to a sport event; visiting patrimony or a monument; doing sport; visiting a museum; going to a library; going to a religious ceremony (Mari-Klose et al., 2010: 15).

is a trend to do activities that stimulate creativity through the return of traditional games, but also using new technologies, through apps. Regarding this last field we include for families computer, Internet connexion and mobile phones in the Maintaining Social Relations basket. But, which “outdoor” activities should we include?

Participants in focus group discussions concluded that our temperate climate permits to do different “outdoor” activities. At the same time, the city offers a wide variety of services and cultural events that sometimes are access free. In any case, participants argued that to do recreational activities (doing sport, visit a museum, going to the cinema) is essential for family life and it is a right for families and children’s to experience different activities, the next words from one participant illustrates this thinking: “The most important is to have the opportunity to do different activities; to experience this, go to the beach has the same importance as visiting a museum, or going to the cinema” (woman-FG2). So, all experiences are important in a minimum budget for a decent life.

After the focus group arguments and the reports mentioned above we foresaw a minimum of 4 non-free activities in the city along the year, 2 sport activities (cycling and swimming) and 2 family visits to museums, plus a drink consumption (2€ per person). Along the year, other freely “outdoor” activities can be developed (going to the beach, walking...etc).

### ***Mobile phone for teenagers***

In Spain, secondary education begins at the age of 12. 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 is a tool to control children; on the other hand, it gives them some freedom. Six out of ten Catalan children between 10 and 15 years old had a mobile phone in 2011 (Idescat, 2012). Thus, we included a mobile phone in the basket for each teenager over 12 years old, also according to the agreement of the FGs participants on this question.

Also, some studies say that mobile phones for teenagers are used as a leisure device<sup>19</sup>. This means mobiles are not only used for family calls, but also used as a social platform to chat with friends, to play games, to exchange pictures, etc. Moreover, some of these applications require an Internet connection (e.g. the message system *Whatsapp* or other social network platforms very common in teenagers in our country (*Facebook, Tuenti*). FGs participants argued that an Internet connexion available through the mobile is seen as important to allow teenagers “social life”. For them is a social tool, needed to be considered “inside the group”. We foresaw this possibility for teenagers using a Wi-Fi connexion through a Smartphone and a pre-payment

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<sup>19</sup> Study about *Mobile Habits* from Protégeles organisation. The survey had a sample of 2.000 children between 11 and 17 years old that had mobile.

card of 12€ per month<sup>20</sup>. According to a study by CNMC (2014) pre-payment cards is the most common form of mobile payment among children aged between 10-14 years old (53,5%).

### ***Birthday party***

A budget to organise a birthday party was also included. Participants in focus groups said it is something important for children. They said it is be feasible to organise a birthday party at home with 5-6 friends. A simple menu and resources are needed for such occasion, so sweet and salted sandwiches were included, as well as a cake and candles, juices, sodas, chips and some party material (table napkin, balloons, sweets).

In addition to the party, 15 € were included for parents to acquire a birthday present for their child (10 years old or 14 years old), included in the section “Toys”.

### ***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 actions 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 develops activities in the sport, leisure and cultural fields. A survey published by Organización de Consumidores y Usuarios (OCU)<sup>21</sup> estimates for the academic year 2013-2014 in Spain an average amount of 38€/month for extracurricular activities along the academic year (9 months).

Moreover, children’s participation in leisure activities and organisations continues in summer. A part from being an activity essential for the socialization of children, according to expert advice the participation in summer camps is also linked to the lack of measures to reconcile 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. Despite this is a need for children and their families, this issue was not included for comparability reasons between countries.

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<sup>20</sup> Study about *Mobile Habits* from Protégeles organisation. The survey had a sample of 2.000 children between 11 and 17 years old that had mobile and estimates that a 52% of the children aged 11 years old have a mobile phone and spend about 12€ per month.

<sup>21</sup> Organización de Consumidores y Usuarios (OCU, 2013) published 26/08/2013 in: <http://www.ocu.org/consumo-familia/nc/noticias/gasto-vuelta-al-cole-2013>

## 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 (boy 10 years old and girl 14 years old): 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/Mobile phone apps also considered nowadays as a toy for teenagers. The proposal in the next table is based on the guideline by Marín, Penón & Martínez (2008:220-246) and the given examples are possible toys to include in the basket in our context.

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, Penón & Martínez (2008:214)<sup>22</sup>. The videogame used as a family activity could be an educational opportunity as it favours the communication and help to develop stronger bonds between parents and children.

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

It is important that toys are safer for children use. 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's market in Spain is the seasonality of consumption of toys (mainly done in Christmas period). 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, the experts in this field recommend reversing this trend. From their point of view it is better to reserve the most especial toys for Christmas or as a birthday gift and redistribute the purchase of toys along the year for educative reasons and because of the need of children to play daily (Marín, Penón & Martínez, 2008).

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<sup>22</sup> Some Videogames proposals are: Wii Party; Invizimals, las Tribus Perdidas; Profesor Layton: la llamada del Espectro (8-11 years old); Kinect Adventures; Start the Party! Empieza la fiesta; FIFA 2011/Pro Evolution Soccer (11-14 years old). (Marinva, 2012).

Table 5. Example of Toys (8-11 years old & 11-14 years old) according to game category.

<b>Type of Game-Category</b>	<b>E.g. Toys 8–11 years old</b>	<b>E.g. Toys 11–14 years old</b>
<i>Physical development (moving and sensory materials)</i>	Ball, skate or bicycle	Ball, skate or bicycle
<i>Symbolic game</i>	Doll, Doll house, costumes, scenarios and marionettes or electrical motor car (e.g. Playmobil).	Costumes, karaoke or soft toy
<i>Construction</i>	Jigsaw (puzzle) more than 500 pieces; scientific experiments; engineering, machine assemble; modelling (diorama, trains) or trinket assemble.	Jigsaw (puzzle) more than 500 pieces or 3D; scientific experiments; engineering, machine assemble; modelling (diorama, ships, model aircraft) or trinket assemble
<i>Rules</i>	Reasoning Society Games (reasoning, association; strategy, maths, language, questions and answers, cards, game of chance); Ability Games (accuracy, magic tricks) or Sport (target games) ((e.g. “monopoly” or “scrabble”)	Reasoning Society Games (reasoning, association; strategy, maths, language, questions and answers, cards, game of chance); Ability Games (accuracy, magic tricks) or Sport (target games) ((e.g. “monopoly” or “scrabble”)
<i>Videogames</i>	Portable Videogame (e.g. GameBoy/Nintendo DS) or Screen Videogame (e.g.PS2, PS3, Xbox o Wii) with different genres: action; platforms; adventures; sports; strategy; driving; simulation or social	Portable Videogame (e.g. GameBoy/Nintendo DS) or Screen Videogame (e.g.PS2, PS3, Xbox o Wii) with different genres: action; platforms; adventures; sports; strategy; driving or simulation.
<i>Internet apps</i>	-	Mobile phone games; mp3; Internet (online-games; virtual social networks)

Source: Based on the guideline by Marín, Penón & Martínez (2008:220-246)

### ***Cultural activities: cinema, theatre, concerts, performances, museums***

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 the development of intellectual capacities.

Therefore, and according to FGs discussions, a minimum budget to go 2 times to the cinema is sufficient because there is the possibility to watch a 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 a budget that for this participation, the same amount included for adults in the Leisure basket. Children should be accompanied by an adult to these events, especially in cities, so we added also the cost to meet this requirement.

### ***Education***

In Spain and Catalonia education is free at all compulsory stages from 6 until 16 years old (6-11 years old primary school and 12-16 years old secondary school)<sup>23</sup>. The Catalan law about rights and opportunities for childhood 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.

Although, there are private schools in our country, we estimated the cost for education in a state school because we believe it is more adequate in a minimum income context.

In this section, we describe and justify the list of items included according to our context.

#### **▪ *School Enrolment***

We included the **school insurance tax** (39€/annual amount) and **parent's association** cost (21€/annual amount). We understand that it is important for the child and the parents to belong and participate in the school parent's association in order to guarantee a good relation with the school, make links with other families and children and benefit from activities organised by the association<sup>24</sup>.

#### **▪ *School Material***

In addition, some materials are required for children and teenagers to develop school work. The following table shows the minimum material required for school tasks.

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<sup>23</sup> This principle is established in the *Spanish Constitution* (article nº 27.4.: "Basic education is compulsory and free") and the *Statute of Autonomy of Catalonia* (article nº 21.4: "Education is free at all compulsory stages and at other levels as may be established by law").

<sup>24</sup> Average annual amount estimated for the academic year 2013-14 in Spain (state schools) in Euros by Organización de Consumidores y Usuarios (OCU, 2013) published 26/08/2013 in: <http://www.ocu.org/consumo-familia/nc/noticias/gasto-vuelta-al-cole-2013>



Table 6. School material included in the Safety in Childhood basket.

Item	Primary School	Secondary School
Case holder	1	1
Gym Bag <sup>25</sup>	1	1
Files	1	2
Notebooks	1	3
Pencils	4	4
Pens	0	4
Eraser	2	2
Rule	1	1
Pencil sharpener	1	1
Felt-tip pens box	1	1
Correction fluid	0	1
Compass tool	1	1
Desk <sup>26</sup>	1	1
Chair	1	1

- **School Meals**

We did not include school meals in the budget. According to a study of the Education Department of Barcelona (2011), less than the 50% of the children use the school lunch service. Instead, children and teenagers go home to have lunch. For this reason we did not include a budget for school lunch, but in the Healthy Food Basket the necessary food for this meal is included.

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<sup>25</sup> School bag is already included in the Clothing Basket: bag / bag-pack.

<sup>26</sup> Desk and chair used at home when doing homework. Focus group participants argued that it was important that children had a quiet space to use by their own to study and doing homework.

- **School Clothes**

We included 2 school smocks for primary school children.

- **School Books**

In Spain school books are not included and families have to buy new books every year. Recycling books is still not extended in all state or private schools in Catalonia. Thus, we forsook the cost of books in the basket (189€/year)<sup>27</sup>.

- **ICT equipment for school work**

From 2009 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, but also to promote students autonomy and team work.

The project was called *Projecte 1x1*. In Barcelona nearly half of the total of schools (primary and secondary education, either state schools or private schools) developed that project that now due to the crisis lacks of resources. During the implementation of that programme teachers modified the contents of the curricula and the classroom activities dynamics according to the requirements of the project (Consorti d'Educació de Barcelona, 2013). In the case of the personal laptop the total cost of the small laptop for each student was 300 Euros for the model proposed. The family paid only half of the cost (150€) and the rest of the cost was financed by the Catalan government.

Data from the study published by Consorti 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 laptop. The schools are thinking on new strategies to continue the ICT programme, for example, to allow that children could bring the parents laptop, if they have one at home for school tasks (Gutiérrez, 2012).

Due to this change of policy since the academic year 2012-13 and also to guarantee cross-nationally comparability, we did not take into account this additional cost. In the Entertaining Social Relations Basket we included a laptop in each household type and this guarantees that no child is excluded to do the school work required using this tool.

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<sup>27</sup> Average annual amount estimated for the academic year 2013-14 in Spain (state schools) in Euros by Organización de Consumidores y Usuarios (OCU, 2013) published 26/08/2013 in: <http://www.ocu.org/consumo-familia/nc/noticias/gasto-vuelta-al-cole-2013>

- **School Excursions**

We included a cost for school annual excursions (24€/month)<sup>28</sup>.

- **Transport**

We do not included here extra mobility cost for home-school-home route. All the travel costs are included in the Mobility Basket.

- **Library**

One of the particularities of our context is the free access to the Municipal Libraries Network of the province of Barcelona. The card is also valid to access other public libraries in Catalonia<sup>29</sup>. For this reason, we did not include in the basket a cost for this service (see detailed explanation in the Leisure Basket).

### **Pocket money**

It is reasonable to include a small amount for pocket money in the budget for each child. We foresaw for a boy of 10 years old 5 €/month because a child of this age is always accompanied by an adult in the cities. However, we doubled the amount for the girl of 14 years old. In this case, we foresaw 10€/month. Both could have 5€ as extra money per month when going out with friends (to have a drink, snack...etc).

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<sup>28</sup> Average monthly amount (during the academic year - 9 months) estimated for the academic year 2013-14 in Spain (state schools) in Euros by Organización de Consumidores y Usuarios (OCU, 2013) published 26/08/2013 in: <http://www.ocu.org/consumo-familia/nc/noticias/gasto-vuelta-al-cole-2013>

<sup>29</sup> See the page web of Municipal Libraries Network: <http://bibliotecavirtual.diba.cat/en/qui-som>

## 2.7. THE MAINTAINING SOCIAL RELATIONS BASKET

In the absence of quality guidelines, we start from the Belgian Maintaining Social Relations Basket in order to guarantee comparability. In this case, FGs arguments around this subject are important to check the items included in this basket and be sure of their adequacy to play social roles in our context.

### ***Visit of Family & Friends: food and extra dinnerware***

The **invitation frequency** according to FGs results is to invite friends or family **2 times per month**.

Regarding the kind of **food** needed in order to do this activity FGs said the best was to organize a “pica-pica” and include “montaditos” (little sandwiches made of bread that contain different ingredients: e.g. ham, cheese, sausages...etc) and “tortilla” (omelette), because eggs are a cheap ingredient. With these easy ingredients people manage to do a complete meal and accomplish this social function. However, to allow cross-national comparability we included a salty and a sweet snack, namely crisps and biscuits.

For **cutlery** and furniture (**chairs**) we assume the Belgian proposal. For items already included in the kitchen equipment basket we used the same priced item and adapted to the quantity required in the Entertaining Social Relations Basket. We opted to include foldable chairs because it is possible to store them after use.

For families without children we include a budget for a simple meal in a bistro out of home six times per year (10 €/adult/meal).

### ***Celebrations & Feasts***

The main **festivities** associated with **feast** in our context are also 6:

- **Christmas Day** (25th December, usually lunch)
- **New Year’s Eve** (31<sup>st</sup> December, usually dinner)
- **Twelfth Night** (6<sup>th</sup> January, usually lunch)
- **Easter Sunday** (depends on the year, usually lunch)
- **Birthdays**

We included a budget to cover the resources employed to celebrate this feast: **rent a party room, decorations** and **new clothes for the celebrated child**. For these items we assumed the budget of the Belgian proposal. We also included a **budget for snacks, food, drinks** and **sweets** as resources for the preparation of such feast.

A budget for **inviting** 10 people, was not considered necessary in order to contact friends and relatives, due to the fact that the model family has access to Internet and Telephone.

### ***Take away meal & Simple Restaurant***

Participants in FGs gave importance to eating in a restaurant, either for adults and children. They said it represents a moment of freedom and relaxation for everybody in the family.

### ***Cards & Presents***

Regarding **presents and gifts** we believe it is important to take into account this item for all members of the model family as in the Belgian basket. According to FGs **Children gifts** are important in our context, especially during Christmas Feast and Twelfth Night. So, we foresaw a budget for minimum 3 gifts along the year. Birthday presents are taken into account in the Safety in Childhood Basket.

As in the Belgian Basket, we foresaw also 6 cards per adult and 4 cards per children to use in these celebrations and stamps to post the letters.

### ***Computer & Other Multimedia applications***

- ***Mobile phone (adults)***

Data from a study from Fundación Telefónica (2014:120) – one of the biggest telecommunication companies in Spain – shows the presence of a fixed telephone line in Catalan households was 82,1%, but 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 that connect to Internet does 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)<sup>30</sup> the average cost of the unmetered Internet access through the mobile and voice service is around 16,3 Euros per month (data 4<sup>th</sup> trimester 2013), (CNMC, 2014:4).

- ***Computer & Internet***

As in the Belgian Entertaining Basket, we included one computer-laptop per family and adding a budget for an Internet connection for domestic leisure (to access music, games, films, etc), school work and informational purposes (newspapers, other TV programmes, documentaries). A laptop is better because occupies less space and permits to transport it in case of need out of home. Also FGs participants said that a laptop is more useful for children, especially when doing school work with their friends out of home (to friends home or libraries). Around seven out of ten people in Spain and Catalonia possess a computer and have Internet connection at home<sup>31</sup>.

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<sup>30</sup> The National Commission on Financial Markets and Competition (CNMC) was created in October 2003. It is the organization that ensures fair competition and regulates the markets and all productive sectors of the Spanish economy to protect consumers. It is a public body with legal personality, independent from the Government and is subject to parliamentary control.

<sup>31</sup> The percentage of people that have a computer at home in 2011: 72,2% in Spain and 75,3% in Catalonia. The percentage of people that have Internet access at home in 2011 was 64% for Spain and 70,6% for Catalonia. Data

Data from the CNMC study (2014:19) show that ADSL connexion is the most common way to access to Internet at home (78,6% of households, 3<sup>rd</sup> trimester 2013). Cable is only used by 17,7% of households. The service most common to contract is fix telephone, mobile and Internet (46,9% of households, 3<sup>rd</sup> trimester 2013) (CNMC, 2014:8). The average cost of fix telephone and Internet service is 33 Euros per month (4th trimester 2013), (CNMC, 2014:9).

- **Printer & Camera**

One Multifunctional Printer is necessary per family. FGs said a multifunctional printer is necessary for school work and also for adults (p.e. to make photocopies of official documents). A pen drive is also added, 2 per family and one more if there are children over 12 years old. FGs said a pen drive is necessary to store a copy of the information and also to transport, especially for children when they need to bring the work at school.

FGs said a camera is better when you make photos as a souvenir; the mobile has not enough quality when you print the photo.

### ***Obligations as a Citizen: the ID card***

It is compulsory to have an **ID card** for every citizen over 14 years all (Spain, 2005, Decreto 1553/2005, Art.2.1). However, as we think is important for security in childhood and also to guarantee sufficient autonomy of the family (p.e. going on holiday) we think we should provide an **ID card for all family members**. The cost to process an ID card application is 10,50 Euros per person. The life span of the ID card is 10 years for adults over 30 years all and 5 years for children and adults below 30 years all.

Concerning having the ordinary **passport** this is a right for the Spaniards and it is compulsory to have it when being out of the national territory (Spain, 2003, Real Decreto 896/2003, Art.2). In a minimum budget we understand 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 other obligations as a citizen 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. The Afiliation tax of Workers in Spain has been all along the democratic period (1977-2008) 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 receives the effects of the crisis and consequently decreases (Catalonia: 12,6%; Spain (total): 16,4%). So, this cost is not included.

In Barcelona a rate the collection of garbage from home is not required, what exist is the public amount for collection of waste (*preu public de recollida de residus*<sup>32</sup>) for individuals or legal

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from *Encuesta de Hábitos y Prácticas Culturales en España* (Ministerio de Educación, Cultura y Deporte, 2012:222-223).

<sup>32</sup> Retrieved 29/07/2014 from:[http://www.bcn.cat/hisenda/ca/principals\\_impostos\\_residus\\_explicacio.html](http://www.bcn.cat/hisenda/ca/principals_impostos_residus_explicacio.html)

entities (public or private), owners of economic activities (shops, offices, services and professionals).

### ***Stationary objects***

We assume the Belgian items and we priced the items in the shop Abacus cooperative because it is a wide spread company in Catalonia specialized in such items and that offers a wide variety of material and good value for money.

### ***Pets***

After enquiring FGs about the question of including pets in a minimum budget the arguments were really controversial, that is why we decided not to include this item in the basket. Even though, FGs participants agreed there is a wide variety of brands and low cost veterinarian services, having pets in good conditions in terms of health and care, need many resources and many added costs, sometimes is like “having a person more at home” in terms of some of the FGs’ participants. In addition, you might need a minimum required space at home, which is something difficult to have, specially, in apartments in big cities. Also requirement of time is needed to respond to the demands of the pet (p.e. going out for a walk). For these reasons, and despite pets could develop emotional links and some educative functions for the maturing process of children, other baskets respond to these functions (Leisure and Safety in Childhood baskets). The same for families without children, there are other activities foreseen in the baskets that do these functions (meet friends/family, participation in cultural events).

### ***Cheerfulness at home***

We assumed the Belgian proposal: items and shops (mainly IKEA, to guarantee cross-nationally comparability).

## 2.8. THE MOBILITY BASKET

The public transport network in the Metropolitan Area of Barcelona covers more than 14.000km<sup>33</sup>, a city in which about a 25% of its population uses private motor transportation on a daily bases and in which although bicycles are more and more common, they are mostly used among youth and only represent a small part of the movements. These data indicate that public transport is the most used form of mobility in Barcelona and were 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 an unnecessary, since the public transportation network is good enough.

The Integrated Fare System makes possible to use the different modes of transport (Underground, bus, tram, FGC and Renfe) in the same journey within the Metropolitan Region extended to the limits of the local rail services, and the neighbor regions of l'Anoia and el Bages. Within each movement from an origin to a destination travelers are allowed to make three transfers between different transport means.

There are several tickets and fares that can be purchased depending on the mobility needs. Following the Belgian example, for the calculation of the public transport costs, we also take into account all the necessary movements in order to fulfill all the needs specified in the rest of budgets (e.g. family outing, domestic holiday, trip to hospital, visit to relatives, theatre or cinema visit...). Thus, for every household member above 14 years old we included a 50-30 travel pass which allows for 50 integrated journeys on 30 consecutive days from the first validation on all modes of transport. Children between 4-12 years old have a personalized ticket that costs 35€ for all the eight years period.

Barcelona is a city with favourable conditions to use a bike. On one hand, because the city has slight slopes. On the other hand, the mild climate all along the year favours a pleasant cycling. However, in 2012 only 2,5% of the journeys in Barcelona and Metropolitan Area were done by bike. One of the problems to use the bike on a daily basis in the city is still the lack of adequate and independent bike tracks that allow a safer cycling, and at the same time, more tolerance and respectfulness between the different actors: drivers, cyclists and pedestrians. In any case, for comparison reasons we include a bike for each family member as well as the necessary equipment for safe riding (i.e.: helmet), and to maintain the bikes.

With the aim of considering 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 foreseen in a second version of this basket. Additionally, to the cost of public transport and a bike for each family member, and in a separate budget, we foresaw the cost of a second-hand car, which includes the cost of insuring, driving and maintenance to allow people to have more freedom of movements.

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<sup>33</sup> <http://www.atm.cat/web/ca/veure.php?pdf=ca/memoria2012&h=770>



### ***Travel Costs for going on Holidays: Train tickets***

For travelling to a holiday place (coast/mountain) we included a cost that guarantees some freedom for the family in order to choose the way of transport and areas to spend the holiday. We include a budget that permits to travel more than 80km away from the city. Thus, we calculate twice the price of a 6 zone of the *Barcelona suburban railway* area<sup>34</sup>. Children between 7 and 13 years old have a 40% discount<sup>35</sup> of the adult price.

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<sup>34</sup> This allows travelling with lines R1, R2, R2 nord, R2 south, R3, R4, R7 & R8 of the Barcelona suburban railway (*Xarxa de Rodalies de Barcelona*), includes both cost villages and inland areas (approximately 60-70 km from Barcelona city). Retrieved 25/06/2014 from:

<http://www20.gencat.cat/portal/site/rodalies/menuitem.490b231a477c4d887fbe6affb0c0e1a0/?vgnextoid=6813559ae eeff210VgnVCM2000009b0c1e0aRCRD&vgnnextchannel=6813559ae eeff210VgnVCM2000009b0c1e0aRCRD&vgnnextfmt=default>

<sup>35</sup> Retrieved 25/06/2014 from: <http://www.renfe.com/viajeros/tarifas/ninos.html>

### 3. CONCLUSIONS

In the previous sections we have described the process of development and the content of the different baskets on the Spanish Reference Budgets following the ImPRovE methodology.

Reference Budgets are not meant to be prescriptive of what people should or should not do or have; on the contrary, they should be seen as an indication of the conditions that must be present to ensure full social participation of every citizen.

So, if correctly developed, RB can have an important role in the measurement of poverty and the assessment of income adequacy, as well as in the contextualization of the at-risk-of-poverty indicator or the assessment of social inclusion policies.

However, the process of building RB is not exempt of limitations. As previously explained, there are a number of unavoidable arbitrary choices that will condition the final RB. For example, the aim of making the comparable cross-nationally necessarily brings tension among the cultural and the comparability needs. Also, it is very difficult to generalize what people need in their leisure time or to experience meaningful relationships. In order to alleviate arbitrary choices as much as possible that a mindful and robust method has been followed and these decisions have been transparently documented through all the process. In this way, the reader becomes fully aware on the conditions under which these RB have been developed for a cross-nationally comparable purpose (see Storms et al., 2013 for the common framework and methodology and for general results of all six cities involved in the project see: Goedemé et al. (2015)).

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## 5. ANNEX: BRIEF NOTE ABOUT HOUSING COSTS<sup>36</sup>

Although the housing costs will be estimated by the CSB-UA coordinating team using the same procedure for the six cities (Van den Bosch et al., forthcoming; Goedemé et al., 2015), the purpose of this brief note is to describe the regulation and local data available regarding costs of housing in Barcelona<sup>37</sup>.

The work is composed of two parts. First of all, a brief contextualisation about housing market in Spain. These preliminary notes about the housing market in Spain and, particularly, Catalonia and Barcelona, are important to understand the data and variables available when measuring housing costs in our territory. The second part focuses on the specific data obtained regarding costs of housing in Barcelona.

### 1. Preliminary notes on the housing market in Spain, Catalonia and Barcelona

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 *Encuesta de Condiciones de Vida* (ECV, 2011)<sup>38</sup> – Statistics on Income and Living Conditions – published in 2012 by the Instituto Nacional de Estadística (INE) – National Institute of Statistics – in 2011 82,2% of households were home owners (52,3% had already paid their mortgage and 29,9% of households were still paying the mortgage). Only 12,1% of households were tenants (9,3% of households were paying a market rent and 2,8% were households in a rented accommodation below the market price). Finally, only 5,7% of households had free cession. Regarding the autonomous region of Catalonia, the scenario in 2011 was similar. In Catalonia 75,8% of households were home owners, 19,5% were tenants (15,2% market rent and 4,3% rent below the market price) and 4,7% of households were free cessions (INE, 2012:9).

Data from the *Enquesta de Condicions de Vida i Hàbits de la Població 2011* (ECVHP 2011)<sup>39</sup> – Survey of Living Conditions and Habits of the Population– published in 2012 by Institut d'Estadística de Catalunya (Idescat) – Catalonia Institute of Statistics – and Institut d'Estudis Regionals i Metropolitans de Barcelona (IERMB) – Institute of Regional and Metropolitan Studies of Barcelona – shows the following distribution in the city of Barcelona:

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<sup>36</sup> Brief note finished in April 2013.

<sup>37</sup> Many thanks to Germán Almendros, lawyer and state agent, who kindly helped us to understand the housing regulations in the Spanish/Catalan context and Institut d'Estadística de Catalunya (Idescat) for the provision of data from ECVHP (2011).

<sup>38</sup> ECV is an annual statistics report produced by INE, since 2004, with the objective to obtain data about households' income, inequalities, poverty, social exclusion and social cohesion at national level (Spain). ECV's statistical operations are harmonized with EU-SILC from Eurostat.

<sup>39</sup> The content of ECVHP 2011 is described in part 2. Costs of housing in Barcelona.



**Table 7. Tenure of main residence, 2011. Barcelona. Percentage distribution.**

Tenure of main residence	Barcelona
Owner, by inheritance or family donation	...
Fully paid property	41,3
Property with mortgage payments	17,1
Tenants	36,1
Other type of tenure	3,1
No record	...
Total	100

Source: Porcel (coord., 2012:42) elaborated with data from ECVHP 2011.

Despite the economic crisis, the housing demand in the city has not decreased, but preferences among the population are changing. In the case of Barcelona, although ownership remains the main option (see Table 7), renting is becoming an increasing practice. 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 Spain has to be understood in the context of a Mediterranean Welfare State, where the family becomes the main agent who guarantees welfare. Although, initially, buying carries a huge financial effort, it is socially perceived as a good investment for the future. The property acquired is considered to be a kind of private social protection. Other reasons that have had an influence on the development of a home-owner culture are, on one hand, the easy access to advantageous credit conditions. Therefore, between 1999 and 2007, the annual cost of a mortgage was cheaper than the annual cost of renting (Aramburu Otazu, 2010). On the other hand, housing policies historically have promoted the home-owner culture, such as tax relief for the purchase of a house, although such exemption has been recently cancelled (Pina, 2012).

Nowadays, due to both credit and tax relief restrictions, unemployment, economic uncertainty and the still high prices of housing, among others, the home-owner culture is put into question. Renting is becoming a more valued option among Spaniards because it fits today's uncertain conditions of life better (Aramburu Otazu, 2010). In the city of Barcelona this trend is becoming visible and renting has grown (between 2008 and 2011) linked to a decrease in renting prices in the same period (Dpt. Estadística. Ajuntament de Barcelona, 2012): monthly average renting costs have decreased, between 2008 and 2011, from 1.062,7 € to 752,9€ (or 14,62€/m<sup>2</sup> to 12,37€/m<sup>2</sup>, usable square meters). 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 and the necessary rehabilitation of the buildings (Bosch, 2011).

## 2. Costs of housing in Barcelona

The purpose of this section is to show the data available regarding costs of housing in the city of Barcelona. The source of the information provided is *Enquesta de Condicions de Vida i Hàbits de la Població 2011* (ECVHP 2011). ECVHP 2011 is the second edition of a survey with a representative sample for Catalonia and Barcelona. The survey gathers information about the social and economic situation of Catalonia's households every five years. It gives specific data of the city of Barcelona and its metropolitan area nearby. The survey focuses on information about the life styles and living conditions of the population (geographic origin; language; level of education and training; work; income and revenue; housing conditions and costs; mobility; social relationships; health, among other subjects). In this edition, the contents related to income and risk of poverty of Catalan population have been added and the methodology is harmonized with EU-SILC by Eurostat (Idescat, 2013).

**Costs of housing** in ECVHP 2011 include (Porcel (coord.), 2012: 26):

- the rent, in case it is a rented dwelling
- the mortgage payments, if it is not a fully paid property
- the costs of maintenance:
  - residents' association
  - energy costs (water, gas, and electricity)
  - insurances and some municipal taxes on housing.

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 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 and cost of housing, the main categories finally analysed are "owners" (see Table 8) and "renters" (see Table 9).

Concerning **quality criteria** for decent housing, a new regulation has just been approved by the autonomous government of Catalonia in December 2012. The regulation aims to establish if a house has the minimum conditions to be used and whether it is suitable to dwell in. If these conditions are guaranteed, the "certificate of habitability" is granted (Generalitat de 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. However, the regulation establishes different criteria depending on the type of building (new constructions; used houses; public housing or renewed houses). Because of these variations and data availability, it is more convenient to follow the common quality criteria for housing proposed in the ImPRovE project (Goedemé et al., 2015) for the housing basket, which are available in ECVHP 2011. In addition, these elements are amenities and structural conditions found in Barcelona's households in a high percentage according to the same survey (Porcel (coord.), 2012: 43-44):

- bath or shower in the home (99,4%)
- WC in the home (98,5%)
- hot running water (96,7%)
- without leaks or problems of humidity (only 16,9% have these problems)

Finally, the chosen **family types** are those agreed for developing the Work Package 13: single-member home, 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.

**Table 8. Average cost of housing (€/month) of the main residence for owners of houses meeting certain quality criteria by family type. Barcelona (city), 2011.**

<b>FAMILY TYPE</b>	Monthly average cost for water, gas and electricity	Monthly average cost residents' association	Monthly average cost for taxes on home and insurances	Average cost of the last monthly payment of the mortgage, including amortization and interests	Total without mortgage	<b>Total including mortgage</b>
Single-member aged < 65	34,18	19,39	12,11	388,24	65,68	453,92
2 adults both aged < 65	51,08	27,39	18,96	433,66	97,43	531,10
1 adult, 1 child	46,97	17,41	13,87	225,69	78,25	303,94
2 adults, 2 children	66,07	44,28	25,59	462,14	135,94	598,08
Other type of household <sup>40</sup>	73,00	25,09	22,76	491,64	120,85	612,49
<b>Total</b> <sup>41</sup>	<b>54,78</b>	<b>26,36</b>	<b>19,02</b>	<b>434</b>	<b>100,16</b>	<b>534,28</b>

Source: Data from ECVH 2011, provided by Idescat.

<sup>40</sup> Category that includes other types of household composition different from the ones described in the previous rows.

<sup>41</sup> In both tables (2 and 3) "total" values express the average monthly amount for each specific cost of housing concerning all types of household composition ("family type").

**Table 9. Average cost of housing (€/month) of the main residence for tenants of houses meeting certain quality criteria by family type. Barcelona (city), 2011.**

<b>FAMILY TYPE</b>	Monthly average cost for water, gas and electricity	Monthly average cost residents' association	Monthly average cost for taxes on home and insurances	Average cost of the last monthly payment of the rent	Total without rent	<b>Total including rent</b>
Single-member aged < 65	18,78	..	..	455,85	19,18	475,04
2 adults both aged < 65	19,46	..	..	420,51	20,18	440,69
1 adult, 1 child	22,58	..	..	619,52	22,92	642,44
2 adults, 2 children	19,61	..	..	605,99	20,18	626,17
Other type of household	33,08	..	..	665,49	36,55	702,04
<b>Total</b>	<b>23,15</b>	..	..	<b>518</b>	<b>24,52</b>	<b>542,45</b>

Source: Data from ECVH 2011, provided by Idescat.

.. Non significant data for this calculus.

The local data obtained through ECVHP 2011 could be considered as complementary information in order to estimate cost of housing in the reference budgets. It is important to bear in mind that these are average amounts actually paid by households. References of fixed amounts have not been found (for example, for maintenance costs – taxes on home are not homogeneous due to different “cadastre values”<sup>42</sup>). Other maintenance costs such as daily/weekly cleaning are not included. For this reason, this note is only a preliminary approach to costs of housing at a local level.

### 3. References for housing costs in Barcelona

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<sup>42</sup> It is the value of a house that is given by the land registry (Ajuntament de Barcelona, 2013).

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