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**GENDER STATISTICS AND SOCIAL INDICATORS IN ECONOMIC DOWNTURNS:
EXPERIENCES AND CHALLENGES FROM SPAIN**

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Invited paper¹

I. INTRODUCTION

1. Both long-term trends and recent events have produced certain signs of change in the panorama of gender statistics and the gender approach to statistics production. It is neither possible nor useful to mention in this paper all the factors that could open up new possibilities in this field. However, it is important to say a few words about the crossroads that could lead to new capabilities for statistical systems (both national and international) and it is also convenient to point out the difficulties that could close these doors without a minimum of success.
2. The global economic crisis sparked in 2008, with its very different social and geographical features, clearly lies at the heart of all our current dilemmas. The challenge is clear: to produce more, better and new statistics to suit measurement needs in terms of material well-being, social progress, human equality and the appropriate use of natural resources in a situation of increasing demand and declining resources.
3. Feminism has been a key countermovement vis-à-vis conventional social sciences and standard statistical production, with and without the aid of other critical approaches. The main and most fruitful heritage stems from the feminist critique of the categories forming the cornerstone of statistical production: work, family, household, sexuality, reproduction, time and care, inter alia. The first task of feminism was its effort to broaden the concept of work, previously constrained within the limits of market values, and its association with the non-natural secondary role of women and its related consequences: earnings, social position, self image, adapted desires, etc. *Invisible* and *unpaid* (household) *work*, *second shifts*, *domestic management*, *intrahousehold economy* and others now form part of the common heritage – and one under permanent review – of social sciences.

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4. The second issue was the *deconstruction* of the traditional concepts of the family² and its archetypal and functional unit: a *bi-parental*, heterosexual, patriarchal couple joined in a single marriage for life. The impact of critical essays and the change in society itself have produced a dramatic change in family classifications and in the names of family positions across the range of statistical products, as well as in the emergence of new fields of research and surveys. Success in this field was absolute. The third major issue arises in the domestic sphere previously deemed to be free of conflict. The visibility of domestic violence and the broader concepts of violence towards women, at work and in other contexts, were followed by new statistical productions in this particular area.

5. Lastly, a fourth issue has highlighted another hidden activity of daily life: the work, time and effort involved in *care*. It is particularly noteworthy that of the many studies and funds associated with ageing and the sustainability of pensions and protection schemes³, most are supported by demographic figures and generally weak hypotheses on employment, working hours and productivity in future decades. Nonetheless, the practical sustainability of care for the elderly (and other individuals) lies out of the reach of the services of the care market. Feminist studies have once again⁴ opened up the research on a key and relevant dimension of care activities (in and outside the home). Together, the hidden labor in the home and gender-based care shape very different stereotyped gender roles, which lie at the heart of one of the great dilemmas of our society: to reach beyond the reconciliation of work and family through shared time and responsibilities.

6. The impact of feminist approaches would probably have been less significant without the long-term success of Fourth World Conference on Women (Beijing September 1995) and its strategic objectives and actions. The conclusions of this meeting fueled the conceptual support of international bodies, and the mainstreaming of gender in all issues led to the crucial demand for new and increased gender statistics.

7. Other complex trends have evolved in a similar direction, albeit with different objectives and agents. Firstly, the forty years old *Movement of Social Indicators* produced the first critical view regarding GDP and National Accounts limits, with many approaches being developed for the statistical measurement of well-being. More attention was paid to the differences and combined effects of lack of income, capital, education or density of social relationships and family ties. The support of the OECD and the European Union in the integration of these approaches into the daily work of statistical offices have had a relevant impact, mainly as regards the Survey of Income and Living Conditions (SILC) survey and the structural indicators stemming from the Lisbon Strategy.

8. The second approach arose from the critical scholars of standard economic categories of *production*⁵ and the practical limitations imposed by many conventions and imputation strategies: where there is few or no prices at all, the measurement of *quality change*, the handling of *defensive expenditure*, the integration of flow and stocks of wealth, among other aspects. The third shift relates to green approaches and (un)sustainable development due to the overconsumption of natural resources (or underinvestment). The impact of these second and third alternative visions in the production of national statistical systems has thus far been very limited.

² See Rubin (1975), Gittins (1985), Davidoff and Hall (1987) and Butler (1990).

³ European Commission: http://ec.europa.eu/employment_social/soc-prot/ageing/index_en.htm and European Central Bank: <http://www.ecb.int/pub/pdf/other/ecbeurostatworkshoponpensions201002en.pdf>

⁴ Of the early essays, see Finch and Groves (1983) and Balbo (1987).

⁵ Georgescu-Roegen (1971) and Naredo (1987).

9. The 2008 economic crisis has completely transformed the previous landscape in a number of ways. Firstly, the effects of the financial and economic crisis have stepped up the demand for information on the situation of people from different groups, income distributions, household and family responses and behavior vis-à-vis the worst consequences of the economic crisis: unemployment, credit shortages and other social and political changes. In addition, the crisis has also brought to light the shortcomings and hidden aspects of some statistical conventions and standard statistical economic products. The second effect of the great economic downturn is the increased demand for new and more relevant measurements of people is well-being, social progress and the handling of natural resources. Besides a number of works in this field, mainly by the OECD and the European Commission, the impact of this approach has been widely disseminated by the Stiglitz-Sen-Fitoussi Report (2009). Lastly, we cannot overlook the third and most significant effect of the economic crisis, which has reduced the funds available in the public sector, statistical offices included.

10. Nevertheless, there is another agent that will probably have the biggest impact on the change in gender statistics and on social indicators. The International Labour Organization's decision to introduce the change in working time⁶ and extend productive activities to include volunteer production and unpaid household services is clearly the start of a truly deep-reaching change. The road may be long, however, due to the incredible complexity of the subsequent stages. If the ILO introduces its reworked classification of working time with the proposed extended view⁷ and the new classification is included in Labor Force Surveys, Time Use Surveys, Income and Living Conditions Surveys, Census and National Accounts, the statistical framework could be very different in the near future. It will also be more congruent with the demands mentioned above and with current needs.

II. GENDER STATISTICS IN SPAIN AND RELATED STUDIES

11. It is probably a little fanciful to begin the history of gender studies in the 1960s or 1970s. Historians, anthropologists and historical demographers have revealed to us the complexity of past societies and surprising examples in diverse families⁸, various strategies for managing land ownership (the main capital in past societies), reproduction behavior and forms of culture. The role of women in medieval and modern times has also been dealt with in great detail⁹. Nevertheless, the changes in the status of women and family institutions in Spain and elsewhere take place during periods of great social and cultural change at any level: in this case, during the emergence of the social struggles in the last quarter of the nineteenth century and throughout the 1920s and 1930s¹⁰.

12. Gender statistics *per se* do not emerge during the nineteenth century. At this time, hidden work referred to any work, including that of men. The first statistics did not come in the form of the tables or databases we know today. The Commission on Social Reform (1889-1893)¹¹ was a collective body that collated the real/statistical figures contributed by its living surveyed informants. It would be some years before the first labor statistics were collected outside the

⁶ The ILO has also adopted the classifications of decent work (ILO, 2008a, 40-46), labor underutilization (ILO, 2008a, 47-51) and volunteer work (ILO, 2008a, 52-55).

⁷ See Figures 3.1 and 4.1 (ILO, 2008b, 10 and 14).

⁸ Of the vast literature, see examples of different groups of researchers in Pastor (1990) and García González (1998).

⁹ See as examples of different approaches Perry (1993), Chacón, Hernández and Peñafiel (1991) and Segura Graíño (1990).

¹⁰ Nash (1983, 1995).

¹¹ *Comisión de Reformas Sociales* (1889-1893).

Spanish Statistical Office, as part of the Institute of Social Reform, a separate body that started the statistics on living costs of workers¹², occupational accidents, working time statistics, strikes and lock-out statistics, workplace injury statistics and related issues. At this point in time, surveys on women¹³ attempted to reveal the particularly harsh conditions in some branches of industry and commerce.

13. Following a couple of decades of *time of silence*, during the 1960s and 1970s the move away from a closed and protectionist economic policy led to strong industrial development, rapid urbanization, a huge international emigration flow and the rise of the tourism sector. This rapid change in society, families and marital behavior encouraged a slow renaissance of empirical studies and theoretical research¹⁴, all unconnected with the statistical system.

14. During the 1980s and early 1990s, some statistical offices developed new projects more or less connected with different aspects of gender studies: broadening of the concept of work (Population and Economic Activity, EUSTAT, 1985 ongoing)¹⁵, survey of living conditions for the first time (INE, 1985), search for family structures and types (Council of Madrid Statistics, Survey of Living Conditions)¹⁶, introduction of the longitudinal perspective (Sociodemographic Survey, 1991, INE)¹⁷, testing of classifications of social class (Biography, Consciousness, Structure and Class, 1991, INE-Region of Madrid Statistical Institute-Women's Institute)¹⁸. The first compilation of data on gender was published in 1983 (*Figures on Women*), which resulted in a preliminary overview of the scarcity and absence of information in the Spanish Statistical System and was updated several times¹⁹. The *Women and Men in Spain* report²⁰, published annually from 2006, offers a general overview of data taken from a wide variety of information on gender in Spain. The quantity and quality of gender studies conducted throughout these years have been considerable.

15. A new subject was introduced in the statistical system in the mid-1990s: domestic violence and violence against women. The increased awareness among public opinion, Government plans and new laws have led to the emergence of a new definition of crimes and the development of new administrative registers²¹. Three important surveys on "Violence against Women" have been conducted (2002, 2002 and 2006) in an attempt to record not only recognized victims but also actual experiences of abuse²². Many works continue along the lines of international harmonization and the definition of different degrees of severity.

¹² Among many others, see *Instituto de Reformas Sociales* (1916).

¹³ Even descriptive surveys were accompanied by hygienic and paternalistic recommendations: *Instituto de Reformas Sociales* (1911) and González de Castro (1914, 1921).

¹⁴ The first empirical study was the "Report on Social Spanish Situation" (FOESSA, 1967), followed by others (1970, 1975, 1980-83 and 1994). The first classical scholarly research was published by Ferrandiz (1974) and Durán (1978).

¹⁵ EUSTAT (Basque Statistical Office), *Encuesta de Población en Relación con la Actividad*, from 1985.

¹⁶ *Encuesta de Formas de Vida de la Población Madrileña* (1989), Madrid City Council (Tobío, 1992).

¹⁷ Instituto Nacional de Estadística (1995).

¹⁸ INE-Instituto de Estadística de la Comunidad de Madrid-Instituto de la Mujer, *Encuesta de Estructura, Conciencia y Biografía de Clase*, with preliminary report by Juan Jesús González (Comunidad de Madrid, 1992).

¹⁹ Subdirección General de Estudios y Cooperación del Instituto de la Mujer (2007).

²⁰ http://www.ine.es/en/prodyser/pubweb/myh/myh_en.htm

²¹ Martín Parra (2007).

²² According to some scholars (Osborne, 2008, 116-119), the relevant information collected raises new questions about many actors at household and domestic level (in addition to violence by men against women): parents-sons/daughters (young children or adolescents), relationships between young and old family members, school/peers, within homosexual couples and other issues.

16. Finally, we can briefly mention the many gender studies that have analyzed the main statistical sources and classifications with proposals for changes or expansions in the Labor Force Survey²³, Structure of Earnings Survey²⁴, National Accounts²⁵ and others.

17. The main change stems from Law 3/2007 for Effective Equality for Women and Men, which has a long Article 20 detailing requirements in the field of official statistics production. In accordance with the requirements of this law, the recommendations of the Higher Council of Statistics²⁶ and after many years of effort, the goal of disaggregated gender information on any statistical product has been met, as noted in previous diagnoses²⁷. The goal remains of producing information with a stronger gender approach (as set down in this Law), but more detailed objectives and plans are required.

18. The available information does not always reach end users. The Women's Institute is to launch a project (National Gender Indicators) that could bring up to date current *Figures on Women*. National Statistical Institute (INE) has the project of a new set of Social Indicators. In all events, new web data services, increased metadata integration and other tools to promote interoperability between remote servers open up new possibilities. These circumstances will allow us to reduce the burden of recording and converting data between databases in order to concentrate efforts on designs for obtaining new data and furthering harmonization between countries, sources and time periods.

III. ECONOMIC DOWNTURNS: NEW DEMANDS?

19. These are not new at all. The message of this paper is that the economic crisis has increased the demand of previously identified needs, increased acceptance among potential users and last but not least, allowed the statistical authorities to allocate the scarce resources to indicators and measurements related to people living conditions. As to the question of which indicators and measurements, this is the task ahead.

20. If we consider gender indicators from a national perspective, the first step will be to build more detailed information, taking into account that the crisis particularly affects vulnerable groups of people and the information and resources currently available, by:

- (a) Attempting to highlight gender indicators related to perceived income by individuals and households and indicators of time use in *wider* productive tasks, along with the combined effect of the crisis.
- (b) Developing indicators of ownership, use of and access to wealth and capital, a key issue in economic crises.
- (c) Working particularly on a series of indicators that are probably the most sensitive in economic downturns: disability and healthy life expectancy, gender pay gap, pre-compulsory education attainment rates, post-compulsory

²³ Carrasco, Alabart, Domínguez and Mayordomo (2004). See also the different perspective of Muro, Raymond, Toharia and Uriel (1998).

²⁴ Cabo, Henar and Calvo (2009), with a very good introductory overview and a second part containing proposals on another statistical product: Survey of Quality of Life at Work (conducted by the Ministry of Labor from 2001).

²⁵ Durán (1995).

²⁶ Proposals and recommendations for the Draft National Statistical Plan 2009-2012 on national statistical needs (INE, 2006)

²⁷ Argüeso (2007) and Pazos (2007).

abandonment of studies (by gender), poverty risk rates, long-term unemployment and others.

- (d) Breaking down a group of key gender indicators into groups of men and women, mainly by socio-economic classification²⁸, educational level and occupation.
- (e) Breaking down a group of key gender indicators into groups of households, classified by socio-economic status, educational level, generation and immigrant background.
- (f) Increasing the time-series span of the main key indicators with a homogeneous universe or definitions, for correct comparison of the effects of the economic downturn.
- (g) Selective monitoring of certain key indicators at geographical level, using the NUTS standard and the capabilities of Urban Audit indicators.

21. The first line of the final output requires a great deal of work on methodological aspects of gender indicators, with comparisons of alternative sources, producing ad hoc variables and tables and talking to a broad group of scholars and institutions for greater consensus in these developments.

22. Some tasks should be promoted at European and international level:

- (a) Unified or harmonized definitions and collection of data on violence against women, including a possible European Survey project.
- (b) Greater effort in the unadjusted Gender Pay Gap, in order to compare the raw indicator in time and space, with the appropriate limitations.
- (c) A European Socio-economic Classification.
- (d) A Web Data Server of Eurostat statistical information (and metadata), to ensure a secure and easy service with a low human resources cost to all end users of National and European gender indicators (and other uses).

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²⁸ “The task force recommends as well that the work on socio economic classification should be followed, in the context of the ESS, and that the DSS and Eurostat should take some initiative in the field” (EUROSTAT, 2007, 51). See also de *Appendix 3: Socio economic classification and ESeC project* (EUROSTAT, 2007, 109-114).

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