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## Rethinking poverty in Barcelona with the new European indicator, 'Reference Budgets'<sup>1</sup>.

Irene Cussó Parcerisas<sup>2</sup>, Elena Carrillo Álvarez<sup>3</sup>, Jordi Riera Romani<sup>2</sup>

**In this article we present Reference Budgets, which are baskets of goods and services that represent the minimum resources necessary for people to reach an adequate social participation, which means that people would have the essentials to develop their various pertinent social positions and roles. The indicator has been constructed for different types of families in densely populated areas of Catalonia, taking Barcelona as a reference city. Different sources of information have been used, based on a common theoretical and methodological framework recently proposed for six European cities to configure the content of the baskets: official guides, expert consultations, survey data and focus group discussions. Apart from housing, healthy eating is the basket that carries the most weight in relation to the total budget. This indicator provides information to contextualise the at-risk-of-poverty threshold, and can also be used to guide social inclusion policies.**

### Introduction

Given the challenge set by the Europe 2020 Strategy for reducing the number of people at risk of poverty and social exclusion, it seems that the figures remain quite stable. The at-risk-of-poverty threshold (AROP) is one of the components for observing the number of people in a situation of poverty or exclusion. It indicates the number of people living in a household with an equivalized net disposable household income below 60% of the median equivalized net disposable income in a specific territory. In 2015, the AROP threshold in the Barcelona Metropolitan Area was of €11,199 per year for a single person household and of €23,518 per year for households of two adults and two children, which positions around 18% of the population below this threshold. This figure is close to the average for the European Union which, from 2010 to the present, has been around 17% (SIMBA, 2018a and b; Eurostat, 2018).

Some authors are critical about the economic approach to the phenomenon of poverty, which is based on establishing an arbitrary point in the distribution of income. First, they point out that this measure, more than reflecting poverty, indicates inequality in a given context. Second, the income receives the direct influence of economic growth or decline, so that the at-risk-of-poverty threshold

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<sup>2</sup> Faculty of Psychology, Education and Sport Sciences, Blanquerna, Universitat Ramon Llull (FPCEEB-URL)

<sup>3</sup> Faculty of Health Sciences, Blanquerna, Universitat Ramon Llull (FCSB-URL).

is an abstract and unhelpful indicator for the design of social policies that support children and their families (Borgeraas and Brusdal, 2008).

In 1975, the Council of the European Union defined people in the situation of poverty in the following way: 'individuals or families whose resources are so small as to exclude them from the minimum acceptable way of life of the Member State in which they live' (Art.Nº1.2). Therefore, what resources does our society require to achieve this acceptable way of life?

We define Reference Budgets, hereafter RBs, as baskets of goods and services that represent a fixed standard of living for different types of families (Bradshaw, 1993). Since February 2013, the European Commission has promoted the development of this indicator in a comparable way, as an instrument to improve the measurement of poverty and the design of social protection in the different Member States (Goedemé, Storms, Stockman et al., 2015a).

In this article, we present RBs that illustrate the minimum resources necessary for people to achieve an adequate social participation in Barcelona, which is defined as the ability of people to fulfill the various social positions they should be able to play as members of society. In the European context, some of these positions could be, for example, being a 'mother' or a 'father', 'citizen', 'student', among others, according to the approach from the *Charter of Fundamental Rights of the European Union* (2000) (Goedemé, Storms, Penne et al., 2015b).

The principal characteristics of this indicator are summarised below: (a) it reflects the minimum acceptable standard of living in a society and at a specific moment in time, often using the opinions of reference groups in that society; (b) it can be updated annually using the consumer price index or in accordance with the changes society is undergoing in relation to this standard of living at a specific moment in time; (c) moreover, the RBs take into account the goods and services in the public sphere and transfers in species. It therefore allows us to estimate the economic effort families must make to achieve a certain standard of living and, finally, (d) to rate the variation of needs according to the type of household and evaluate, in particular, the investment represented by children within households (Borgeraas and Dahl, 2010; Decancq, Goedemé, Van den Bosch et al., 2013; Goedemé and Rottiers, 2011; Storms, Goedemé and Van den Bosch, 2011).

In this way, it presents a new social indicator that provides a holistic understanding from a normative perspective of the needs of families and children, which will be contrasted with empirical evidence based on the consensus with city residents through discussion groups. This approach shows certain potential to contextualise the traditional at-risk-of-poverty threshold and, especially, if it is developed transversally in the different countries using a common theoretical and methodological framework. It also provides information to guide policies aiming to guarantee the rights and social inclusion of families with children.

### **1. Reference Budgets in Europe from a common theoretical and methodological framework**

Over the course of the 20th century, RBs have been created in different ways and in different countries, both in Europe and in other continents (Fisher, 2007; Goedemé *et al.*, 2015b). In the case of Spain, RBs are a relatively new field of study, as we find just one reference to their creation in 2009 for the city of Madrid by the Asociación de Usuarios de Bancos, Cajas y Seguros (Association of Banks, Funds and Insurance) (Warnaar and Luten, 2009). In 2012, the ImPRovE project set the challenge of constructing RBs using a common theoretical and methodological framework for highly urbanised areas corresponding to six large European cities: Antwerp, Athens, Barcelona, Budapest, Helsinki and Milan. This research has constituted the first step in exploring whether it is possible to create this indicator in a comparable way so that it can be a new tool for contextualising poverty and guiding social policies in Europe (Goedemé, Penne, Hufkens et al., 2018). At the same time, it also constitutes an opportunity to promote this perspective in our territory.

### 1.1. How have we constructed the basket of goods and services?

Firstly, the standard of living referred by the RBs respond to the minimum resources necessary to be able to carry out the development of social positions and roles.

Secondly, to put this acceptable standard of living into operation, Doyal and Gough's (1994) theory of human needs was adapted to the European context. These authors identify two universal 'basic needs' which are prerequisites in all cultures: physical health and autonomy. From here, the concept of 'intermediate needs' is developed, which must satisfy these universal principals. The ImPRovE project has defined the following intermediate needs, which will be transferred to the basket of goods and services: (1) Healthy food, (2) Suitable clothing, (3) Rest and leisure, (4) Personal an health care, (5) Maintenance of significant social relations, (6) Safety in childhood, (7) Mobility and (8) Adequate housing (Storms et al., 2013).

Thirdly, the type of population referred to by the RBs will be standardised: in this case, adults and children in a good state of health, well informed and with sufficient competence and autonomy to be able to develop their daily lives. Therefore, with the assumption of this premise, the RBs obtained will not be generalisable for the population as a whole. This is an element to consider when it comes to interpreting the results. Thus, the RBs are constructed for the four well-described family types: (1) single man/woman of an active age; (2) couple composed of a man and woman of active age without children; (3) woman of active age with responsibility for a child aged 10 and a (4) couple composed of a man and a woman of active age with two children (a boy aged 10 and a girl aged 14).

Finally, the geographical field of reference for which the RBs are created is standardised: highly urbanised areas with a wide network of public transport corresponding to the six large European cities mentioned above. In order to guarantee the comparability of the RBs in the different cities, standardised procedures have been followed, so that the differences between the content of the RBs in each territory can only be due to variations in the institutional sphere, climatological or geographical conditions, the cultural values of each context, and the availability, quality or price of the different goods and services that make up the RBs (Goedemé et al., 2015a).

The intermediate needs described above are associated with functions that are specified in a list of goods and services, which are assigned a useful life and a price. The first phase, within the framework of the ImPRovE project to build the goods and services baskets, began from a 'common base' supported by international guides and prior research on RBs in Belgium. Each country carried out adaptations for each basket depending on their institutional, cultural or social context, and specific climate or geographical conditions, to build their own RBs. Based on regulations, guidelines, experts and other documents and statistics in each field, the baskets of goods and services were adapted for our context. Then the acceptability of these baskets was verified in three discussion groups with adults, as well as the patterns of consumption. Finally, a price was assigned to each of the products and services included for Barcelona as a reference city. Therefore, a reference budget was obtained for each basket. This process included a review by the coordinating team concerning the steps followed and the results obtained (see details in Cussó, Carrillo and Riera, 2018).

In the second phase, in order to consolidate the indicator in our context, new discussion groups were set up with children and adults in densely populated areas of Catalonia. The views of children have been little explored in RB research. In our case, the arguments collected in groups with adolescents have been very rich and essential for understanding their needs. In total, between the discussion groups of the first and second phases, there have been 73 participants (44 adults and 29 adolescents)<sup>4</sup> with different socio-economic profiles distributed among the 10 discussion groups

<sup>4</sup> In order to hold these groups, all of the participants were informed and their consent obtained. In the case of minors, their parents or legal guardians also gave their consent. In all cases, the confidentiality of the information

in which a main social consensus was reached about the minimum resources necessary to achieve an acceptable standard of living in these areas (see details in Cussó's thesis, 2017).

Table 1 shows the different sources of information consulted. This process was registered in harmonised Excel documents for each one of the baskets, except for the real costs of adequate housing for households owned and rented in densely populated areas of Catalonia. This information was calculated by the project coordinating team using the *European Union Statistics on Income and Living Conditions* (EU-SILC 2012), so that it could be comparable across all six cities. It includes the estimation of the real cost of adequate housing for homes owned and rented in densely populated areas of Catalonia and of their energy services (water, electricity, gas or other fuels) updated using the consumer price index of 2014 (see method used in: Goedemé et al., 2015a).

**Table 1. Sources of information to adapt baskets of goods and services to the local context.**

Baskets of Goods and Services	Official guides	Number of experts	Literature	Statistics	Discussion groups
Healthy food	•	2	•		•
Suitable clothing	•	5	•	•	•
Rest and Leisure		2	•	•	•
Personal and Health care		1		•	•
Significant social relations	•			•	•
Safety in childhood	•	5	•	•	•
Mobility				•	•

Source: Original.

## 2. What are the minimum resources necessary for an adequate social participation?

Before presenting the results, we should note that the RBs do not reflect the actual consumption of households, rather, the objective is to establish an acceptable standard of living below which it is not possible to fulfil the social positions agreed on in our society.

Graph 1 illustrates the minimum reference budget for the different baskets of goods and services we have included in the study for the four types of family. The reference budget is between €422.10 and €1,549.40 per month depending on the type of home. Moreover, in Graph 2 we have added the estimated real costs of adequate housing depending on the ownership. In this case, the total budget is €560.40 per month for a single person and up to €1,785.80 per month for a household with two adults and two children that is owned<sup>5</sup>. However, this budget is higher for rented homes<sup>6</sup> and is between €979.60 and €2,216.60 per month for the same types of family, respectively.

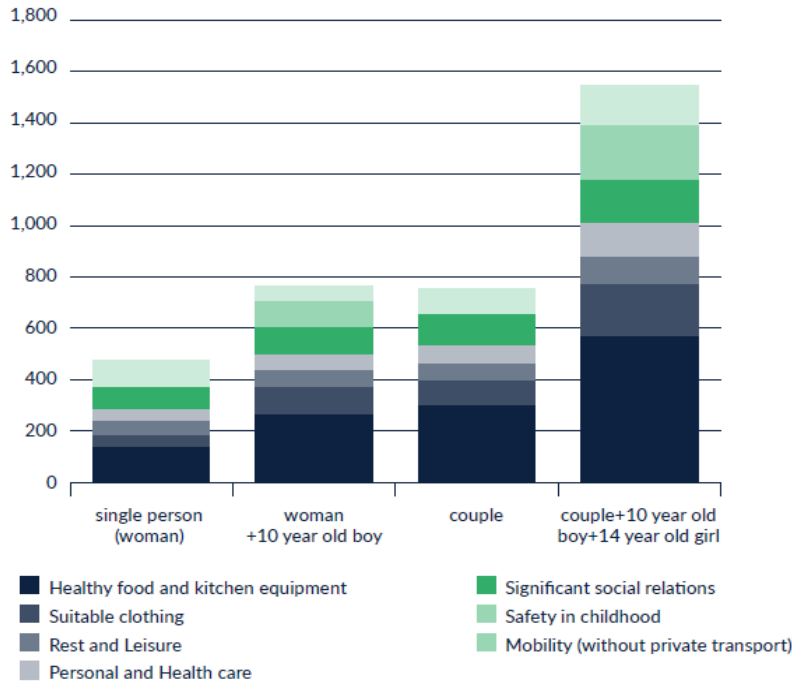
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obtained and the anonymity of the participants of the discussion groups has been guaranteed. These elements have been fundamental both to guarantee the ethical principles of all of the research and to ensure its scientific rigour.

<sup>5</sup> We include here only outright owners.

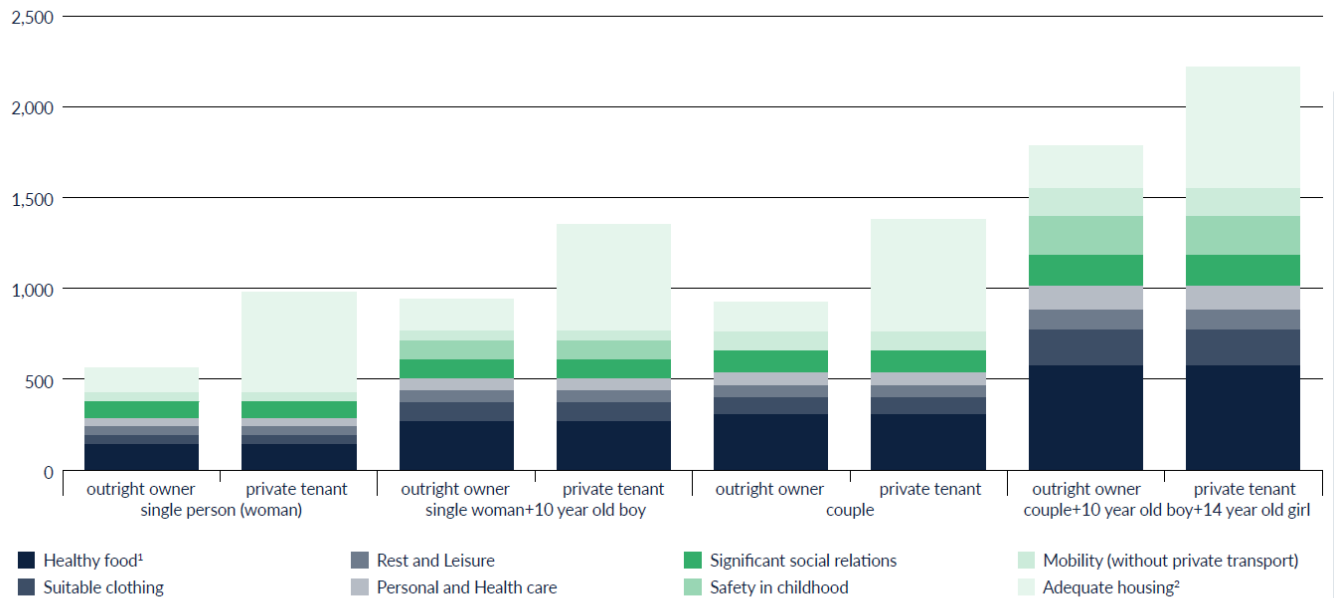
<sup>6</sup> We include here only private tenants.

**Graph 1. Reference budget for four family types. €/month. Barcelona, reference city, 2014.**



Source: Own computations.

**Graph 2. Reference budget for four family types by type of tenure of housing. €/month. Barcelona, reference city, 2014.**



1. Healthy food: includes kitchen equipment.  
 2. Housing costs: data provided by the coordinating team of the ImPRovE project.

Source: Own computations with the exception of housing costs

Apart from housing, healthy food is the basket that carries the most weight in relation to the global budget in all of the types of family. It represents over 30% in relation to the total and extends to around 40% in families with two adults. This emphasised that in the case of healthy eating, the budget increases proportionally to the number of members of the household, that is, there are no economies of scale (Carrillo, Cussó i Riera, 2016). The other cities participating in the research

also establish that healthy food represents the most significant part of the global reference budget, from 28% in Milan to 47% in Helsinki (Goedemé et al., 2015a:20).

Elements such as sweets or soft drinks present in the upper part of the food pyramid have not been considered as part of the healthy menu but have been taken into account in other baskets such as the maintenance of social relationships or safety in childhood, since these products have an important social, psychological and emotional role, as the participants in the discussion groups have stated:

'When you share a Fanta Orange with the family, with our daughter, it is a moment in which we are together, for her, it is a prize, a moment of happiness.' (GDA3, P57, woman, lower social class, Barcelona).

Coinciding with the other European cities, the basket for the maintenance of significant social relations carries the second greatest weight in relation to the total budget for households of a single person and couples without children. In our case, it represents between 20 and 16% of the total budget. However, this ratio is estimated at between 13 and 11% of the global budget when the household has three or more members, which shows certain economies of scale. New technologies are the most important categories in the framework of this basket, not only for the work of adults or the school activities of children, but also for their social function, as argued by the participants of the discussion groups:

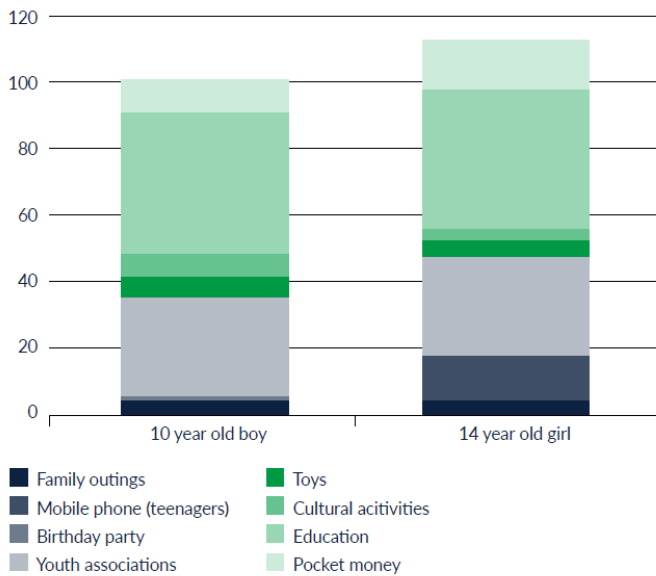
'When you let them have a mobile phone, if it does not have an Internet connection, they will not want it, it is a social thing.' (GDA2, P1, woman, upper-middle class, Barcelona).<sup>7</sup> Children could even be excluded. The fact of not having a computer could make a difference in school because they would not have access to games, videos, social networks...' (FGJ3, P2, boy, upper-middle, Bcn).

The relative weight of the other baskets in relation to the total budget depends on the number of members of the household and the presence of children. For example, the adequate clothing basket is around 13% of the global budget when there are young children in the household, which is explained by the higher quantity of clothing for children and, at the same time, its shorter useful life. In contrast with the other five cities studied, the safety in childhood basket represents 14% of the total budget, being the second in weight after healthy food for families with two children. For this reason, it is important to look in detail at the composition of this basket in our context.

Graph 3 illustrates the contents of this basket. We observe overall that the minimum monthly reference budget is higher for a girl of 14, due to the inclusion of a prepaid mobile device and a higher quantity of pocket money for personal use, in accordance with the arguments put forward by the discussion groups that from adolescence more independence is needed. In the case of the profile of the boy of 10, we highlight the fact that the budget for the organisation of a birthday party has been added, and, when it comes to cultural activities (e.g. going to the cinema), we have taken into account the accompaniment of an adult. Despite these differences, it is clear that the categories that require the highest budget in the framework of safety in childhood are education and belonging to youth associations for both profiles.

<sup>7</sup> GDA followed by number: adult group discussion code; GDJ followed by number: youth discussion group code. P, followed by number, participant code within the discussion group.

**Graph 3. Reference budget for the Safety in childhood basket. €/month. Barcelona, reference city, 2014.**



Source: Own computations.

In the case of education, although in our country it is free and compulsory from 6 to 16 years, it represents an investment for families, as we have included the materials and school books that must be renewed, with the exception of some recycling practices that emerge in some contexts:

'P3: Textbooks are changing every two or three years: P1: Some schools are more sensitive to this subject and therefore they bear it in mind and do more socialisation of books.' (GDA2, P1 and P3, women, upper-middle class, Barcelona)

Also in this basket, in accordance with the arguments put forward in discussion groups, the participation of children in extra-curricular activities and family activities in association with parents has been taken into account. These elements are fundamental for the development of children's social positions, being a 'pupil/student' within the framework of school and also being a 'friend', which can combine with extra-curricular activities in youth groups, as the discussion groups showed:

'Three days a week minimum they have to come, but because I want them to switch off a bit, to have interactions away from their school and have other ways of seeing things and other areas, of other people, not just their school.' (GDA6, P2, woman, lower class, AMB).

'So to make new friends, because when you are little you have your school friends, but apart from your school friends, you have to have more friendships. So I think that extracurricular activities help to expand your friendships and see people from other schools who think differently.' (GDJ3, P3, girl, upper-middle, Barcelona).

When it comes to the baskets for mobility, personal and health care, rest and leisure, they represent a lower proportion of the global budget. Firstly, regarding mobility and in accordance with the discussion groups, the different public transport systems in Barcelona and the Metropolitan Area were considered sufficient to fulfil this need. It was observed that the discounts applied to transport tickets for those under the age of 13 in 2014 reduce the budget for this basket for families with children<sup>8</sup>. Even so, it was pointed out that in order to carry out other leisure activities, the use

<sup>8</sup> It must be said that in recent years, the age range has been extended due to discounts applied to transport tickets for children up to 16 years of age as of January 2017 (ATM, 2016).

of a private car would give families more freedom. The bicycle has also been included as a means of transport and for leisure, even though its use still cannot be generalisable for all situations.

Secondly, access to universal public services such as health and a good quality-price relationship of personal hygiene products are factors which reduce the budget in these baskets. Thirdly, the possibility our climate offers to carry out activities outdoors also reduces the budget for rest and leisure.

Finally, it must be kept in mind that the inclusion of housing costs makes the relative weight of all baskets change, as when it is added it becomes the main part of the budget, especially for private tenants, as can be seen in Graph 2. Specifically, the weight of housing for this category represents 56 to 30% of the global budget depending on the type of family, and for owners it is from 24 to 13%. In all the cities participating in the project, it is established that as the number of members of the household increases, the weight of housing decreases, indicating the presence of economies of scale (Goedemé et al., 2015a).

Once the costs of housing have been added to the global reference budget, we can compare the threshold obtained with the threshold of relative poverty. In Graph 4, the reference budget for different types of family is expressed as a percentage of the at-risk-of-poverty threshold for 2015 in the Barcelona Metropolitan Area (SIMBA, 2018b). The modified equivalence scale of the Organisation for Economic Co-operation and Development (OECD) has been used to adapt this threshold to other types of household: first adult, value 1; second adult and children of 14 or older, 0.5, and children younger than 14, 0.3<sup>9</sup>. Likewise, the RBs indicator for 2015 has been updated using the general consumer price index (CPI) of the province of Barcelona, although there is very little variation in the estimated amounts (INE, 2018). For example, the budget obtained without housing costs is between €421.60 and €1,547.70 per month depending on the type of household<sup>10</sup>.

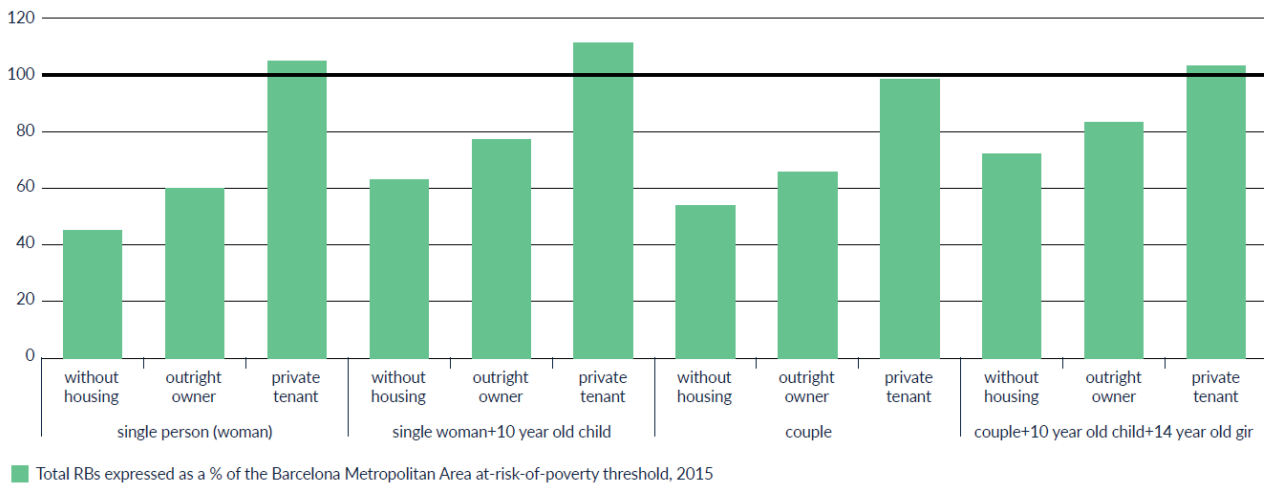
The bars in Graph 4 indicate the total RBs expressed as a percentage of the Barcelona Metropolitan Area at-risk-of-poverty threshold. If the value exceeds 100%, the budget estimated with the RBs is above the at-risk of poverty threshold. We emphasise that for households rented at market prices, the threshold obtained through RBs is at or above the AROP threshold, which means that the latter is inadequate to achieve an acceptable standard of living. However, the threshold of relative poverty would be sufficient to carry out an acceptable standard of living for outright owners in all four family types. We must be cautious in the interpretation of this information because the baskets of goods and services have been constructed with local prices for Barcelona as a city of reference, except for housing which corresponds to densely populated areas of Catalonia, while the poverty threshold corresponds to the Metropolitan Area as a whole.

<sup>9</sup> Single person: €11,199.1 /year (€933.26 /month); Couple (equivalence scale 1.5): €16,798.65 /year (€1,399.89 /month); woman with child of 10 (equivalence scale 1.3): €14,558.83 /year (€1,213.24 /month); Couple with boy of 10 and girl of 14 (equivalence scale 2.3): €25,757.93 /year (€2,146.49 /month).

<sup>10</sup> It must be taken into account that the consumer price index is calculated from the average level of consumption, while the goods and services within the RBs are based on lower prices. Even so, this is how the RBs are updated annually, as well as the recommendation to update the contents of the baskets every five years to take into account the changes that occur in our society (Bradshaw, Middleton, Davis et al., 2008; Lehtinen, Varjonen, Rajas et al., 2011; Storms et al., 2013). In this case, given that the price of the baskets was assigned during the 1st semester of 2014, the index for this period is estimated in the following way: Medium CPI 1st semester 2015 / Medium CPI 1st semester 2014: 0.998 (INE, 2018).



**Graph 4. Reference budget for four family types and tenure status expressed as a percentage of the at-risk-of-poverty threshold in the Barcelona Metropolitan Area, 2015.**



Source: Own elaboration

The RBs have been updated for the year 2015 through IPC of the province of Barcelona (INE, 2018). Relative poverty threshold for AMB from the Survey of living conditions (ECV) 2016 of the INE and Idescat. The information regarding rent refers to 2015.

Taking into account the results in the other cities, it is noted that the relative poverty threshold set at 60% of the median income distribution does not mean the same in the different European countries, while the OECD modified scale of equivalence underestimated the relative weight of children in a household (Goedemé et al. 2015a; Oldfield and Bradshaw 2011; Storms and Van den Bosch, 2009). According to the indicator and without taking into account the costs of housing, a child aged 10 in the household supposes an additional budget of 75% in relation to that estimated for a single person, very similar to a second adult in the household which is 73%. Although it is necessary to look more deeply into this question, the scale of equivalence for children derived from the RBs is greater and practically the same as a second adult: it is between 0.6-0.7 without the costs of housing and between 0.4-0.5 in rented homes depending on the city of reference (Penne, Cussó, Mäkinen et al., 2016). Therefore, the RBs constructed in a comparable way help us to better understand the needs of each member of a household, the goods and services within the reach of the public, and economies of scale to reach an acceptable standard of living.

### 3. Conclusions and outlook

We must bear in mind that RBs do not aim to prescribe what people must do or have, but to establish a standard of living below which it is not possible to develop the agreed upon social positions. Nor do they estimate actual consumption, but are constructed based on some needs which are previously defined and operated based on normative criteria established in our society and contrasted with discussion groups. Moreover, the indicator calculates the additional reference budget of children in households and also takes into account the provision of public goods and services.

Given these characteristics, the approach of RBs brings a new perspective to situations of poverty, because beyond establishing a 'monetary' threshold below which it is not possible to maintain an acceptable standard of living, it responds to a framework of essential intermediate needs in order for people to develop. Therefore, it offers a new background for guiding social policies, as well as social and educational action to combat poverty.

On the one hand, the indicator provides information about the accessibility of families to goods and services in the public sphere and its impact on the global reference budget in each one of the needs. In addition, when it comes to contextualising the at-risk-of-poverty indicator, it can serve to rate the suitability of minimum salaries or minimum income. On the other, it can be used as a diagnostic tool for vulnerable groups and in social accompaniment to promote abilities and

competences for the development of their day to day life, for example to promote healthy eating, the organisation of family leisure, or the management of family economy and debt.

However, one of the main limitations of this study is the fact that the RBs have been developed for some specific types of family: adults of active age and children (aged between 10 and 14) in a good state of health, well-informed and with sufficient independence and competences to be able to develop their day to day life. These assumptions mean that the results obtained are not generalisable for the population as a whole. Certainly, taking into account other circumstances is one of the lines of improvement to be able to consolidate this indicator in the future in our context. Another element to highlight is the long construction process of this indicator. In order for the indicator to have practical implications in the field of social policies and in the measurement of poverty, it is necessary to construct it for other types of families, as well as ensuring that it is updated periodically. Finally, other needs not developed in this research would need to be included, such as security or life-long learning.

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