



INSTITUTO NACIONAL DE ESTATÍSTICA  
STATISTICS PORTUGAL



# “The Portuguese Experience On Measuring the Social Economy” ... and the way ahead...

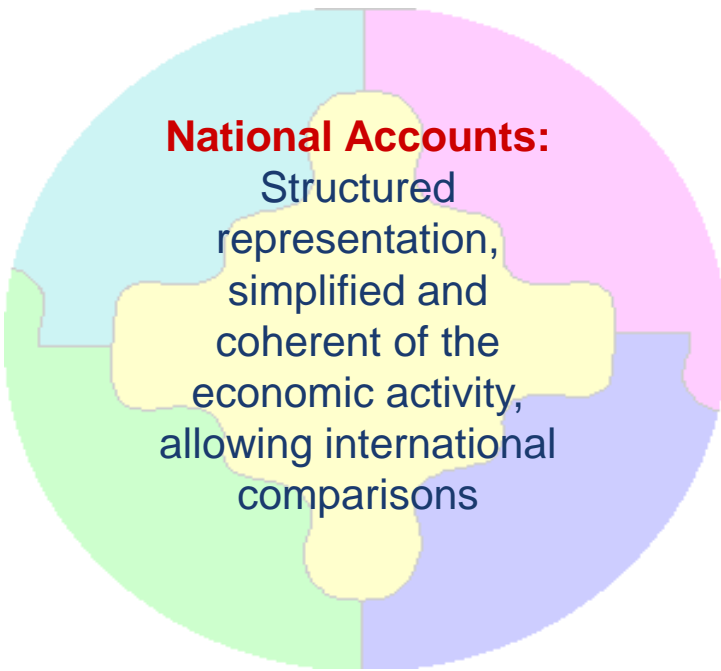
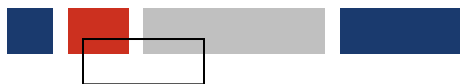
Statistics Portugal  
March 2016  
UNSC





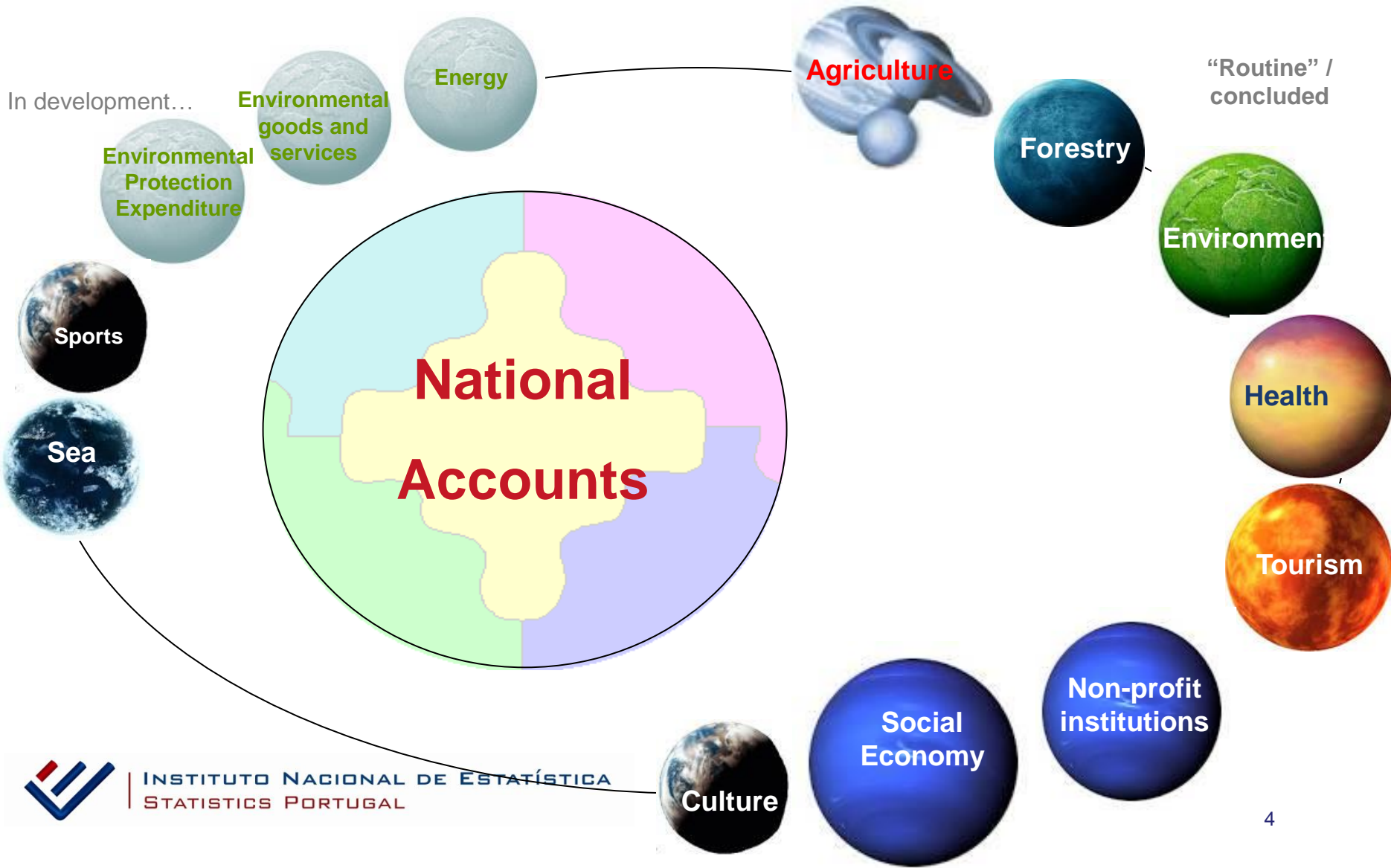
- 1. Social Economy Satellite Account (2010)**
- 2. Survey on Volunteer Work (2012)**
- 3. Work in progress: Social Economy Satellite Account (2013)**
- 4. The way ahead: Methodological developments**







# Satellite Accounts in Statistics Portugal



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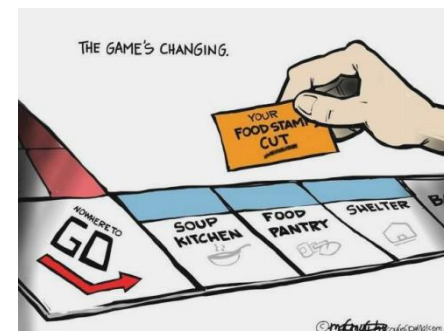


# 1. Social Economy Satellite Account (2010)

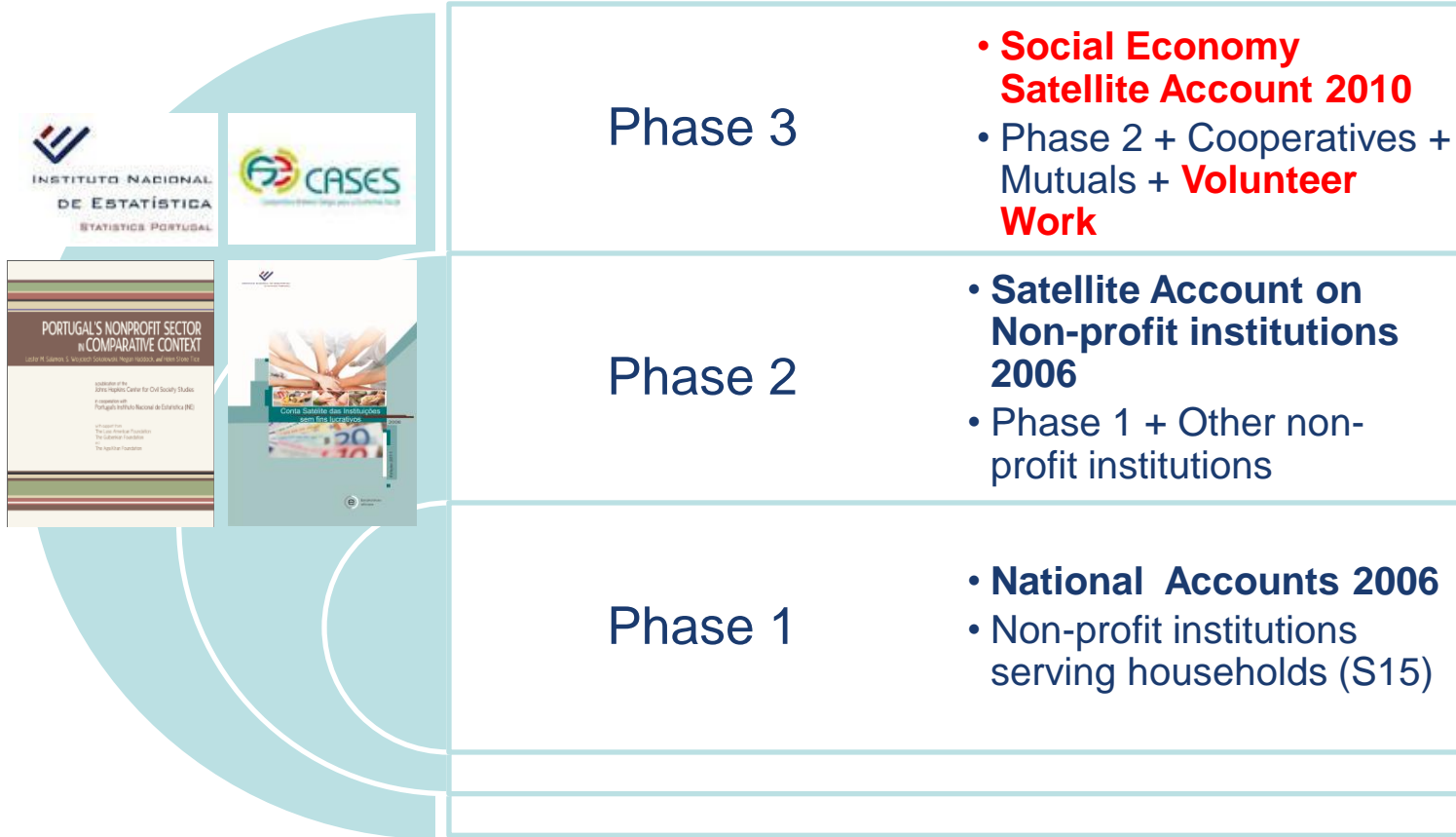
2. Survey on Volunteer Work (2012)

3. Work in progress:

4. The way ahead...



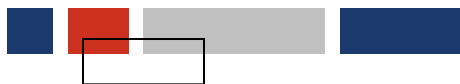
# 1. Social Economy Satellite Account (2010)



“American perspective”

“European perspective”





# 1. Social Economy Satellite Account (2010)

## Methodology and conceptual framework





# 1. Social Economy Satellite Account (2010)

## Main sources of information

### National Accounts

- National Accounts working tables;
- Simplified business information (IES);
- Labour force survey;
- Already existing surveys on Environmental NGOs, mutual aid-associations, Professional organizations, etc.

### Administrative data

- Social security: Budget and Accounts of Private Institutions of Social Solidarity;
- Ministry of Finance: “Foundation census”;
- Social Security: Remuneration statements;
- ...

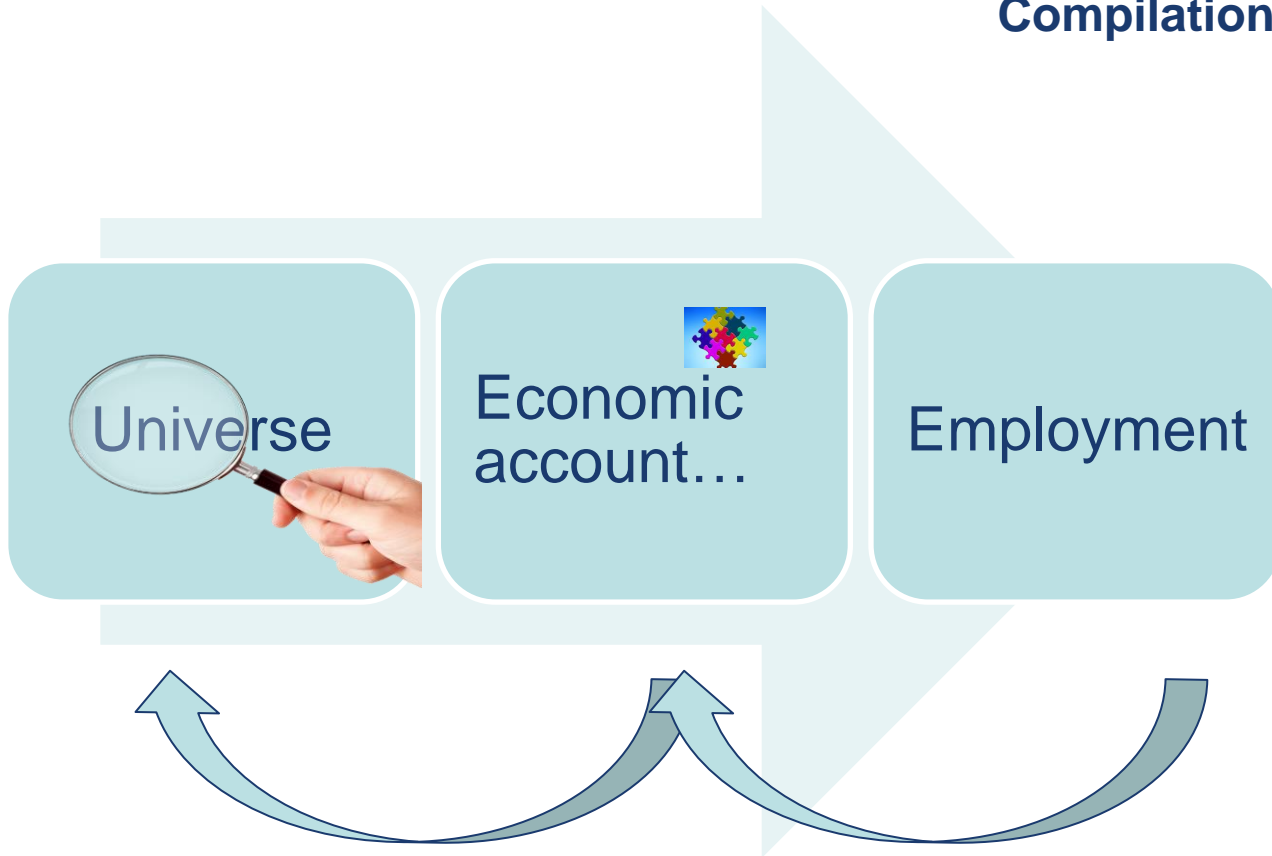


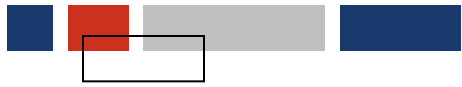




# 1. Social Economy Satellite Account (2010)

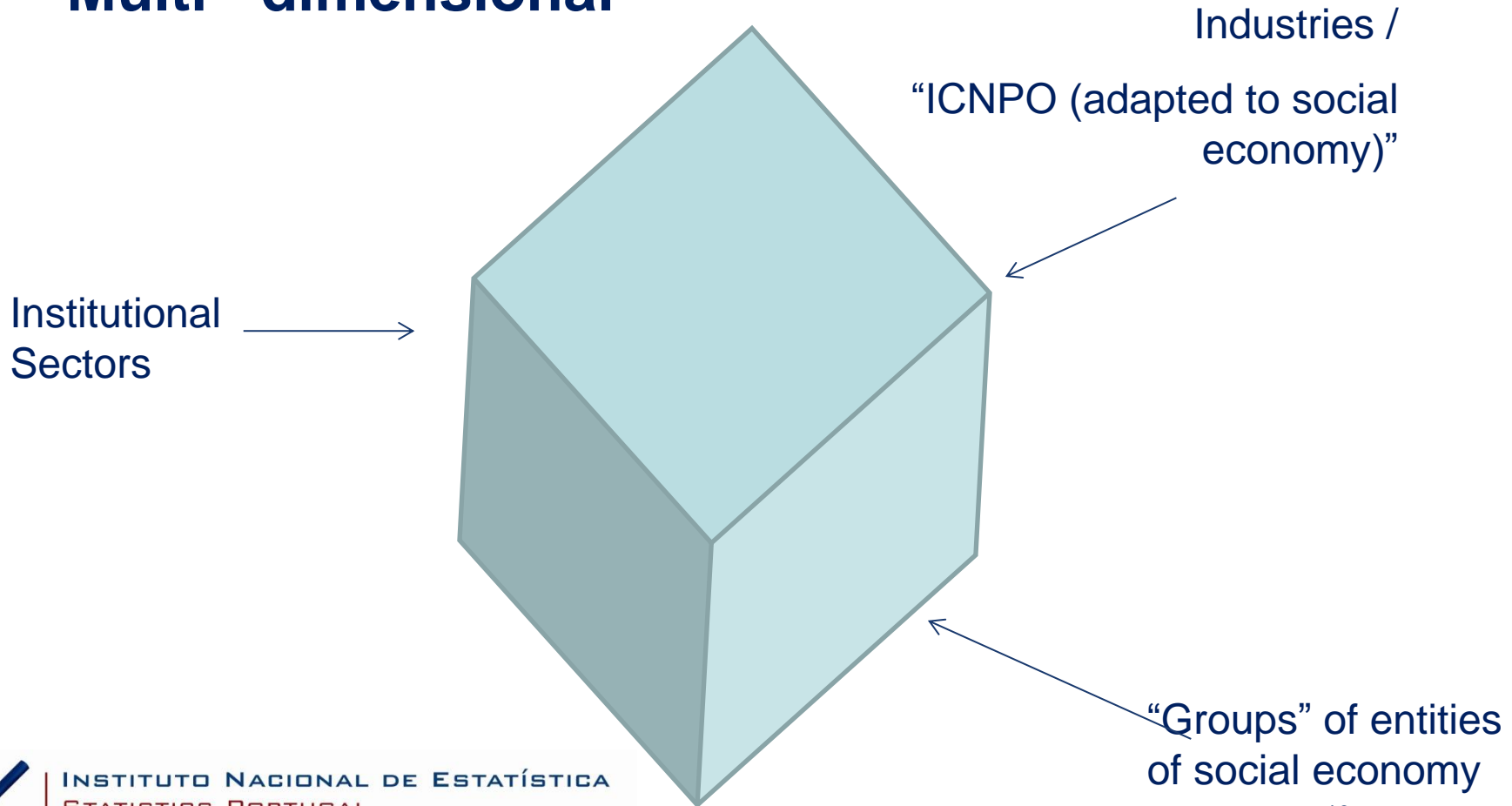
**Compilation process...**





# 1. Social Economy Satellite Account (2010)

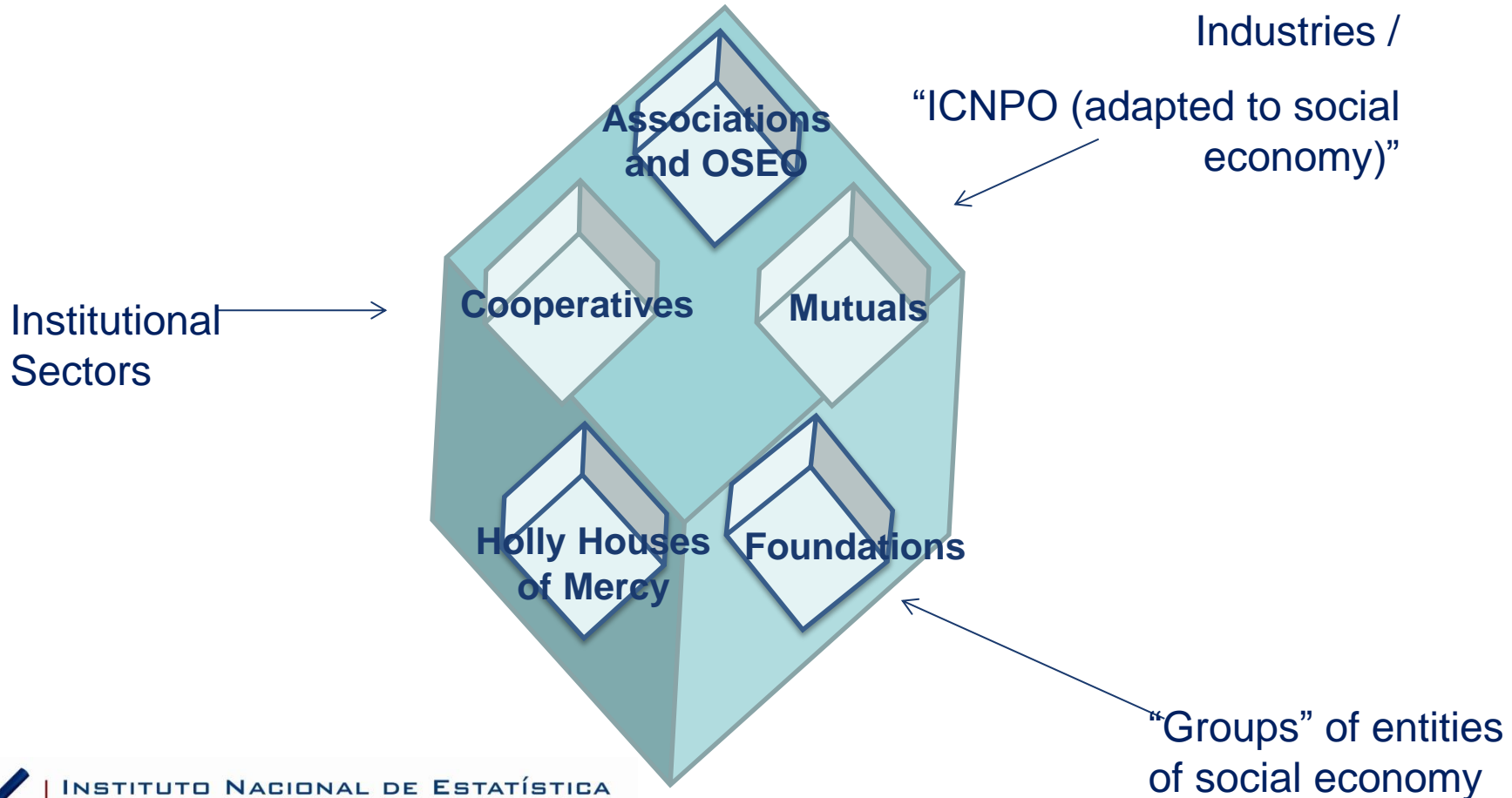
## Multi - dimensional

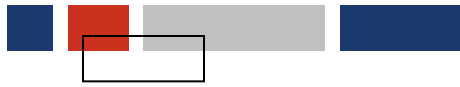




# 1. Social Economy Satellite Account (2010)

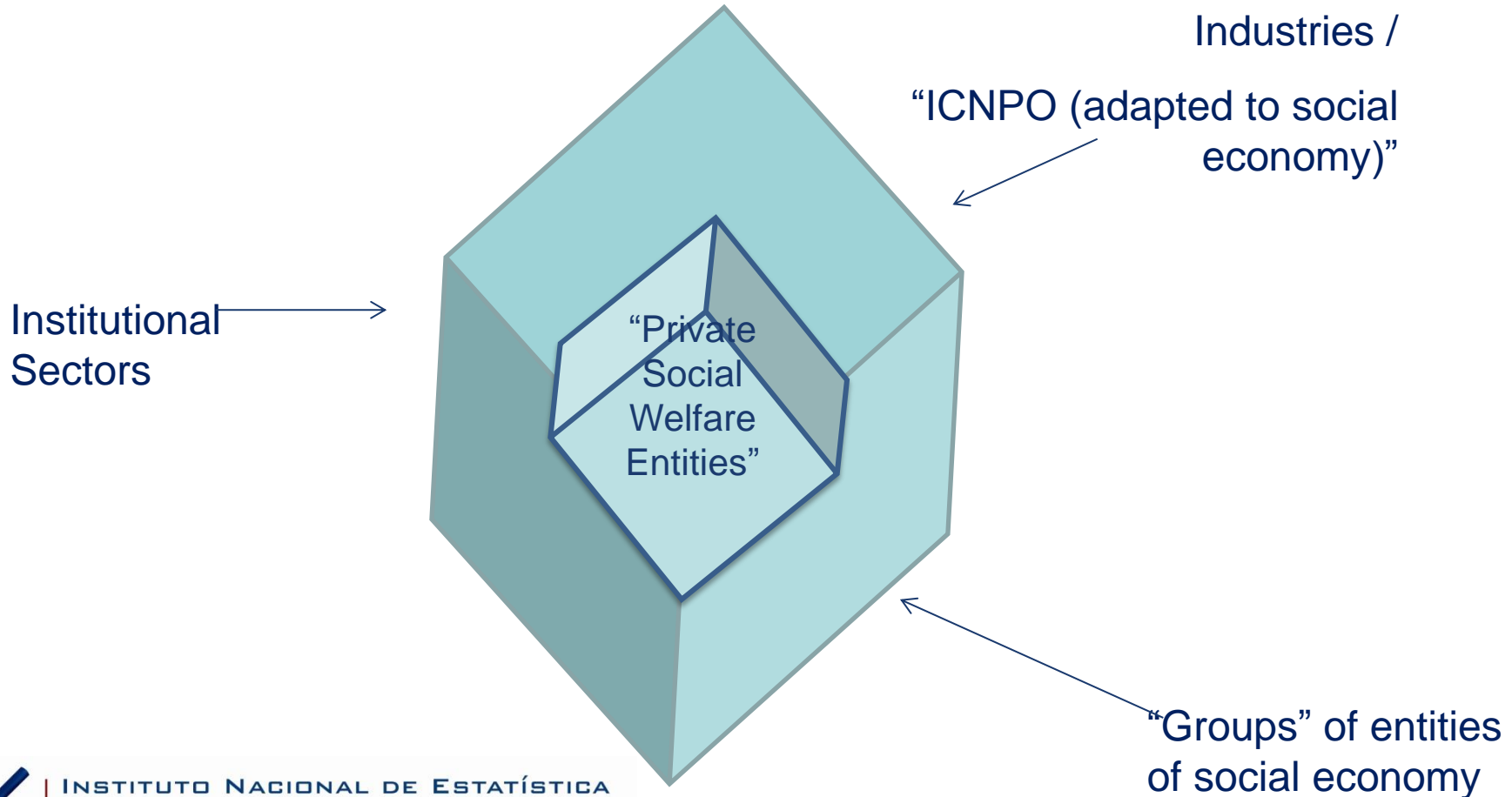
## Modular





# 1.Social Economy Satellite Account (2010)

## Modular



# 1. Social Economy Satellite Account (2010)

## Main results



### Social Economy Satellite Account

(April 2013):

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# 1. Social Economy Satellite Account 2010)

## Main results

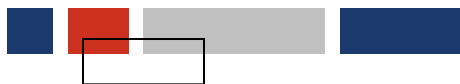
- **In terms of contribution to national economy and compared to other activities**

- GVA
- Activities
- Employment
- Average compensation

- **In terms of financial situation**

- Net borrowers
- Transfers & subsidies
- ....
- ....





1. Social Economy Satellite Account (2010)
- 2. Survey on Volunteer Work (2012)**
3. Work in progress:
4. The way ahead...



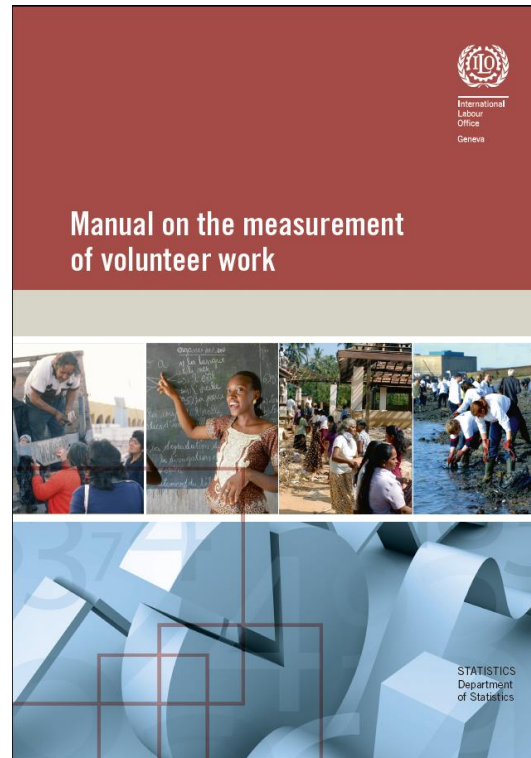
## 2. Survey on volunteer work (2012)

### ILO Manual

Methodological and conceptual reference:

*Manual on the Measurement of Volunteer Work*

International Harmonization

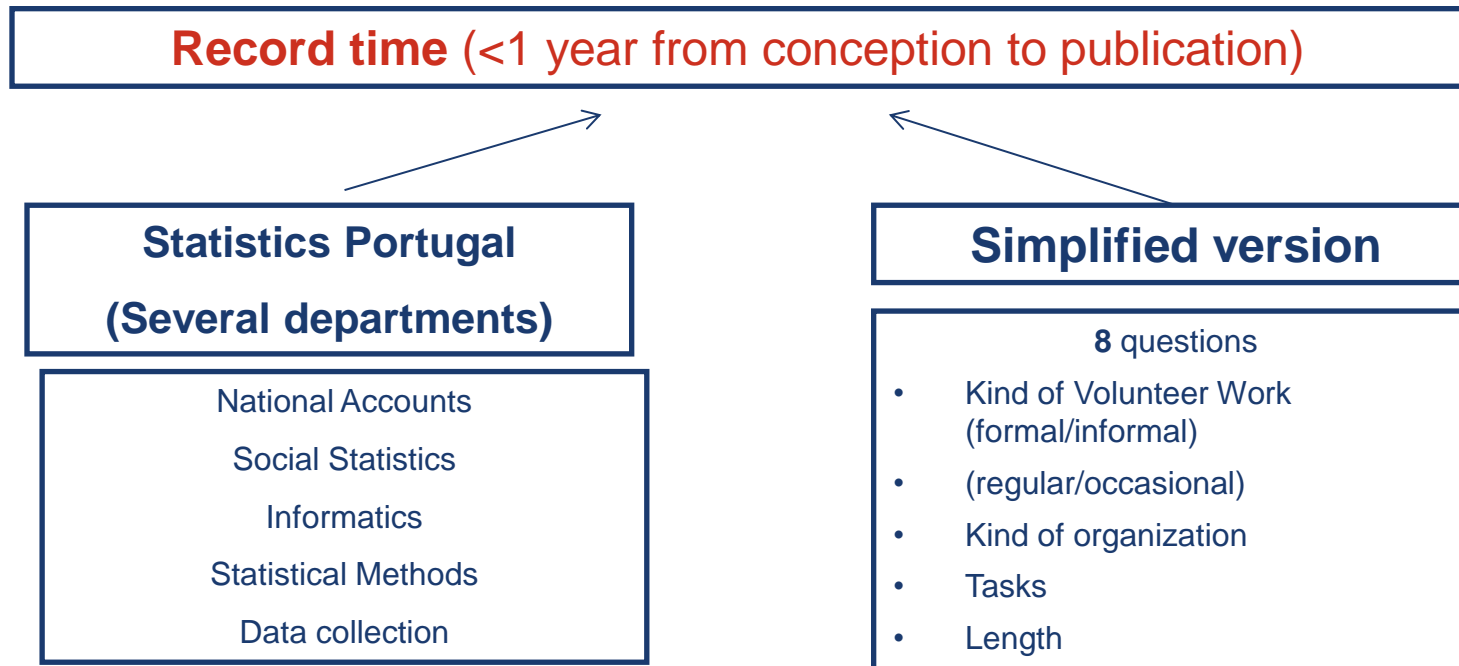




## 2. Survey on volunteer work (2012)

### Pilot survey on volunteer work 2012

(module to Labour Force Survey 3<sup>o</sup>Q 2012)



## 2. Survey on volunteer work (2012)

### Pilot survey on volunteer work 2012 (simplified version)

- Introductory questions
- Q0. Who answers?
  - Q1. Tell me, please, did you carry out, if in the last **12 months**, some kind of volunteer work?
  - Q2. Was the volunteer work done for some organization or directly to other individuals not living in your household?
- If formal VW (or both)
- Q3. Now think only about the organization to which you devoted most time. Can you indicate the **type of organization** for which you did this volunteer work?
  - Q4. Could you describe the **main activity** of this organization?
- If formal (or both) → Q5 (a). Could you describe at most 3 **tasks** that you have carried out for this organization?
- If informal (or both) → Q5 (b). Could you describe at most 3 tasks that you have carried out directly to other individuals not living in your household?
- Q6. Now consider the volunteer work to which you devoted most time. Was it **regular or occasional**?
- If regular → Q7. In the last 12 months, on average, how many **hours** per week did you devote to volunteer work?
- If occasional → Q8. In the last 12 months, how many hours did you devote to that occasional activity?





## 2. Survey on volunteer work (2012)

### Lessons & Weaknesses:

- Very specific and sensitive theme, different from the theme of the main survey (LFS)
  - Possibility of proxy answer
  - Socially “well valued” activity
- “Simplified” version of the ILO Manual model



- Difficulties in granting acceptance and commitment in the answer
- Weak (?) quality of the answers
- Possible overvaluation of the answers (in particular in the declared hours of the volunteer work)



## 2. Survey on volunteer work (2012)

### Strengths:

- Use of the best practices and international recommendations;
- Use of the Labour Survey as “vehicle operation”:
  - Standardization of statistical methods
  - Sample selection and dimension, ensuring representativeness
  - Robust methodology
  - Use of advanced technologies in information collecting (CAPI and CATI);
  - Sociodemographic characterization of the interviewed
- Opportunity but sensitivity of the theme



**relevant and pioneer statistical information**





## 2. Survey on volunteer work (2012)

### Volunteer work and Social Economy

volunteer work in **Social Economy** organizations corresponds to approximately

**90% of formal volunteer work.**

volunteer work, expressed in FTE, represents around

**40% of Employment (FTE) of Social Economy.**



## 2. Survey on volunteer work (2012)

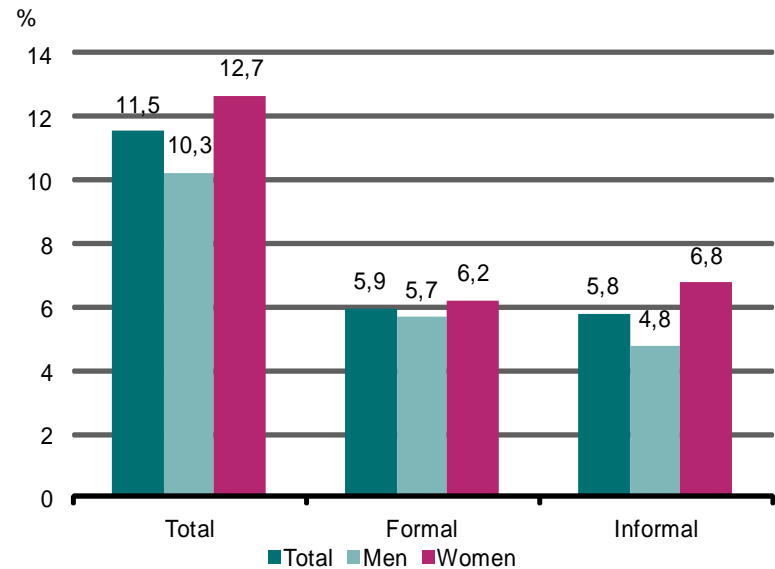
### Main results in **Sociodemographics**

- **Volunteer rate: 11.5%**

(1 million and 40 thousand volunteers)

- Female Volunteer Rate is higher, in any kind of volunteer work (formal/informal)

Volunteer rate, by sex and type of volunteer work



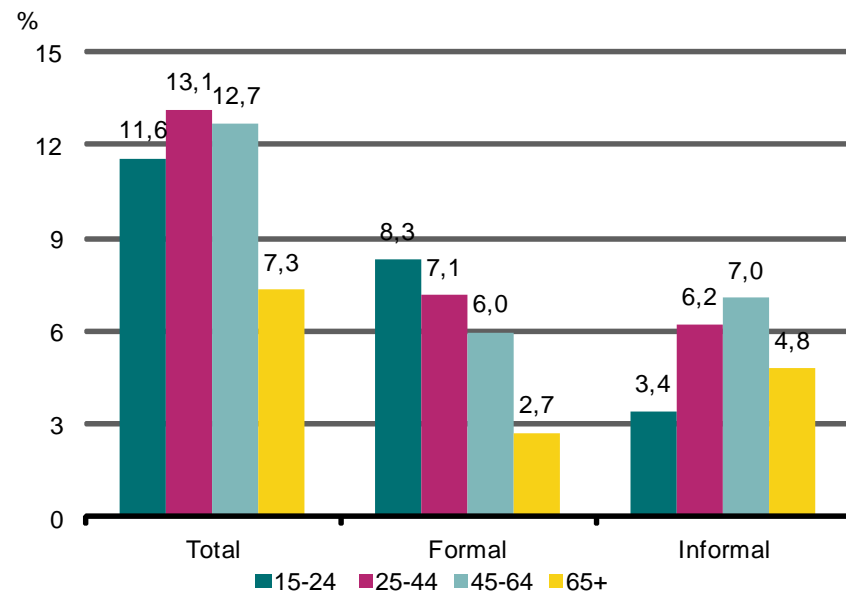
## 2. Survey on volunteer work (2012)

### Main results in **Sociodemographics**

2.

- **Volunteer rates** are higher in the age groups 25-44 (13.1%) and 45-64 (12.7%)
- **Formal Volunteer work** is higher in younger age groups: age 15-24 (8.3%)
- **Informal Volunteer work** is more relevant in older age groups: age 45-64 (7.0%)

**Volunteer rate, by age group and type of volunteer work**

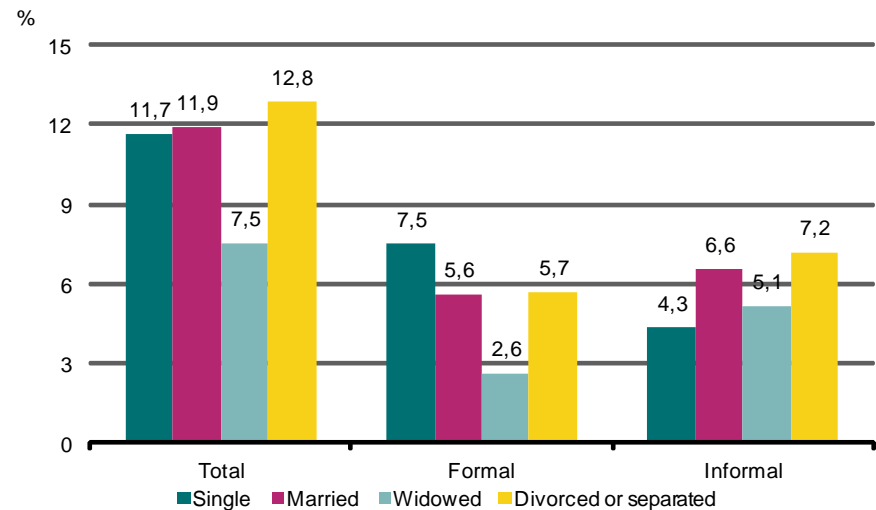


## 2. Survey on volunteer work (2012)

### Main results in **Sociodemographics**

- Higher **Volunteer rates** in divorced/separated individuals (12.8%)
- **Formal Volunteer work** with greater expression in single individuals (7.5%)
- **Informal Volunteer work** is more relevant in divorced/separated individuals (7.2%)

Volunteer rate, by marital status and type of volunteer work



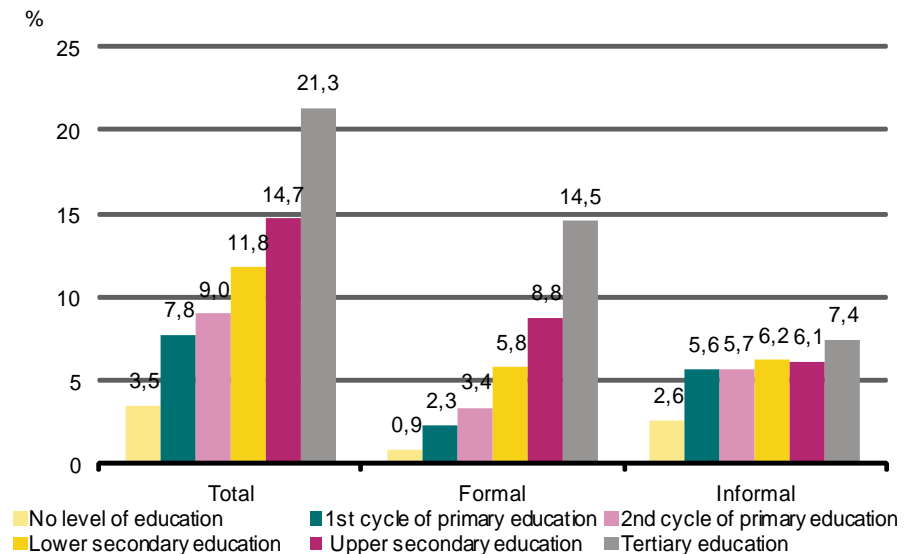


## 2. Survey on volunteer work (2012)

### Main results in **Sociodemographics**

- Participation in volunteer work increases with the **level of education**
- Higher rates of volunteering in those with **tertiary education** (21.3%)
- **Formal Volunteer work** with higher expression in single individuals with **tertiary education** (14.5%)
- **Informal Volunteer work** with higher expression in single individuals with **tertiary education** (7.4%)

**Volunteer rate, by level of education and type of volunteer work**

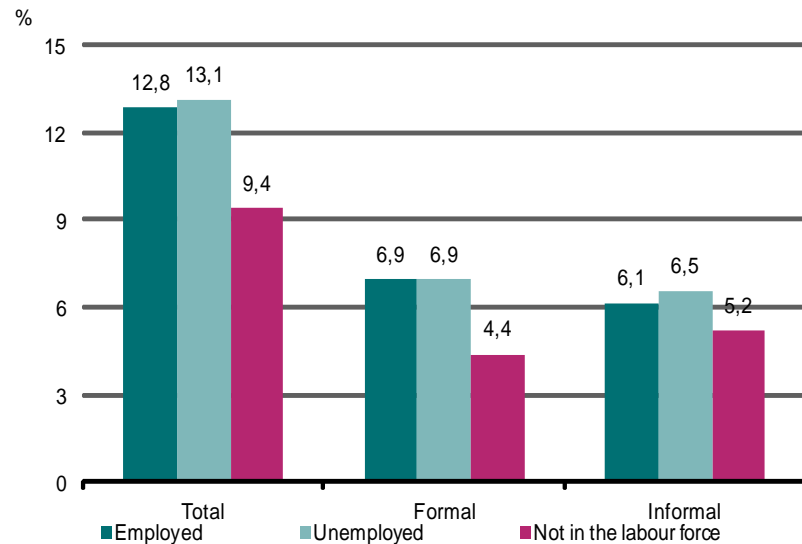


## 2. Survey on volunteer work (2012)

### Main results in **Sociodemographics**

- Higher **Volunteer rates** in unemployed individuals (13.1%)
- **Formal Volunteer work** with higher expression on the unemployed and employed (6.9%)
- **Informal Volunteer work** with higher expression on the unemployed (6.5%)

Volunteer rate, by labour force status and type of volunteer work



## 2. Survey on volunteer work (2012)

### Main results

#### Portuguese Volunteer Worker in 2012: profile

##### Formal

- Women;
- Younger individuals;
- Single;
- Individuals with higher level of education;
- Unemployed.

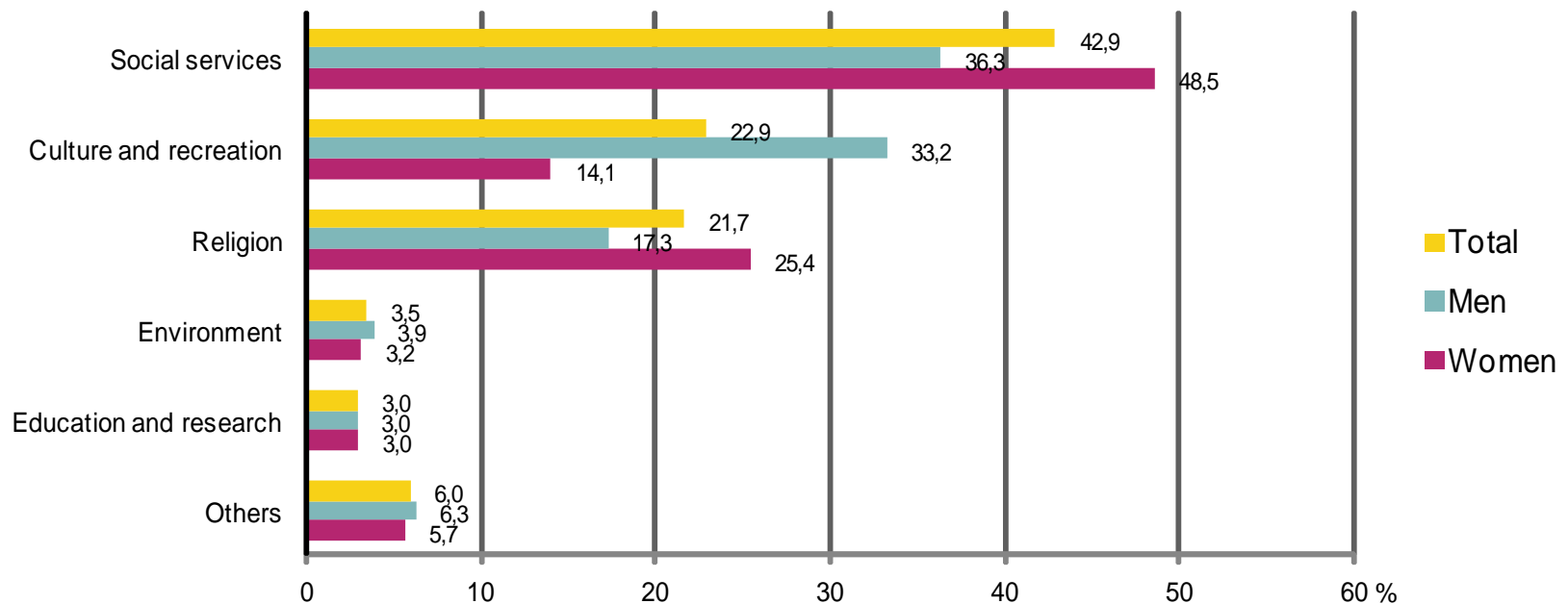
##### Informal

- Women;
- Older individuals;
- Divorced or separated persons;
- Individuals with higher level of education;
- Unemployed.

## 2. Survey on volunteer work (2012)

Main results: **Domains of activity**

### Breakdown of formal volunteers by International Classification of Non-Profit Organizations (ICNPO)



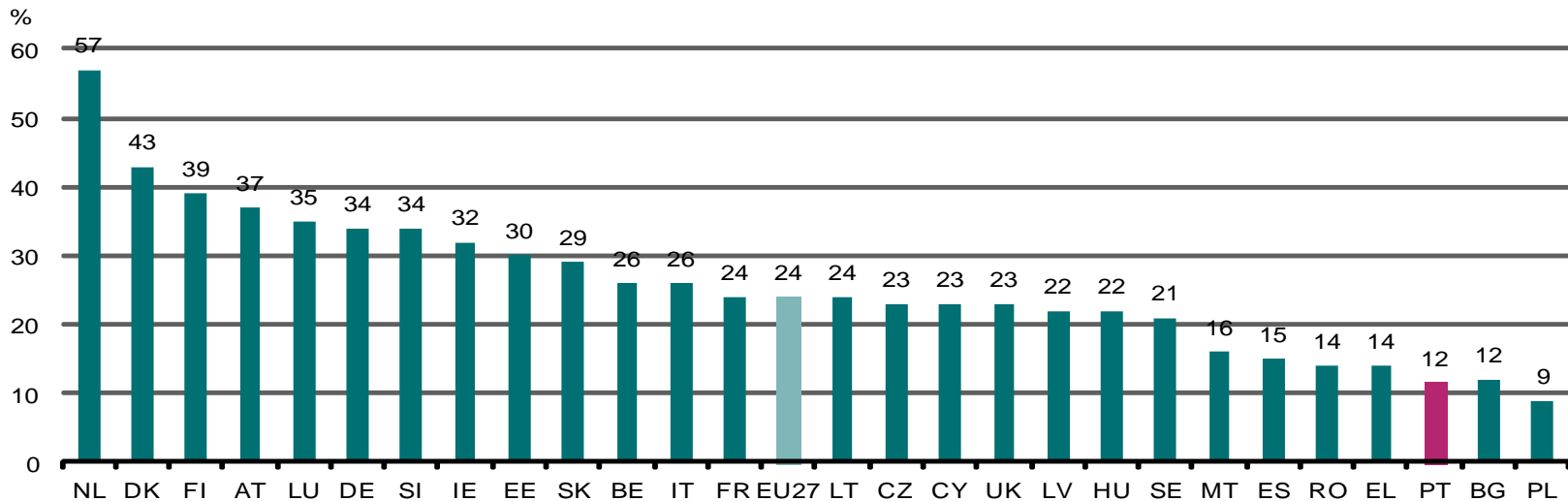
- **Total:** social services (42.9%), culture and recreation (22.9%) and religion (21.7%);
- **Women:** social services (48.5%) and religious activities (25.4%);
- **Men:** social services (36.3%) and culture and recreation (33.2%).

## 2. Survey on volunteer work (2012)

### International comparison



#### Volunteer rate in EU27



Souces: Survey on Volunteer Work 2012 (PT); Eurobarometer 2011 (other MS)

- Higher volunteer rates: northern Europe, particularly Netherlands (57% of the resident population with 15 or more years admitted their participation in volunteer work);
- Smaller volunteer rates in countries of the late Eastern Europe (Poland was the Member State with the smallest rate: 9%);
- Portugal was in the antepenultimate position, with 11.5% (12% on the chart due to rounding).





**For more information...**

**Press release (April 2013):**

[http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_destaquas&DESTAQUESdest\\_boui=157410423&DESTAQUESmodo=2&xlang=en](http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaquas&DESTAQUESdest_boui=157410423&DESTAQUESmodo=2&xlang=en)

**Publications :**

Social Economy Satellite Account (April 2013):

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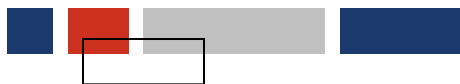
Labour Force Survey (May 2013):

[http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_publicacoes&PUBLICACOESpub\\_boui=153367812&PUBLICACOESstema=55574&PUBLICACOESmodo=2](http://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publicacoes&PUBLICACOESpub_boui=153367812&PUBLICACOESstema=55574&PUBLICACOESmodo=2)

**Tables (April 2013):**

[https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_contas\\_nacionais&contexto=cs&selTab=tab3&perfil=97154797&INST=116634832&xlang=en](https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_contas_nacionais&contexto=cs&selTab=tab3&perfil=97154797&INST=116634832&xlang=en)





1. Social Economy Satellite Account (2010)

2. Survey on Volunteer Work (2012)

3. Work in progress...

**Social Economy Satellite Account (2013)**

4. The way ahead



### 3. Work in progress...

## Satellite Account on Social Economy 2013:

### Law 30/2013: Basic law of social economy

#### Artigo 6.º

##### Base de dados e conta satélite da economia social

1 — Compete ao Governo elaborar, publicar e manter atualizada em sítio próprio a base de dados permanente das entidades da economia social.

2 — Deve ainda ser assegurada a criação e a manutenção de uma conta satélite para a economia social, desenvolvida no âmbito do sistema estatístico nacional.

Regular production of a satellite account for social economy in the context of the national statistical system...

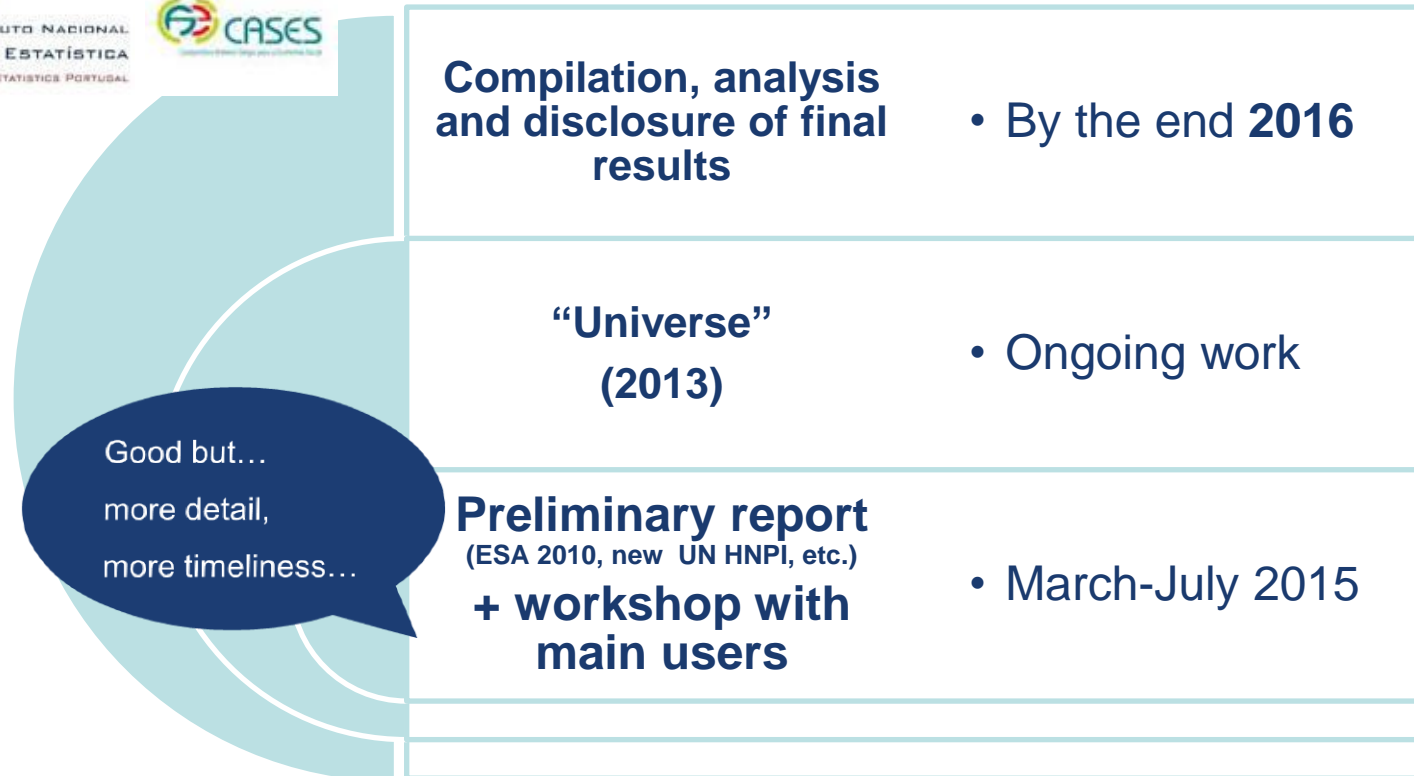




### 3. Work in progress...

## Satellite Account on Social Economy 2013: Calendar

# New partnership agreement...



Good but...  
more detail,  
more timeliness...





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- 4. The Way Ahead: Methodology developments**



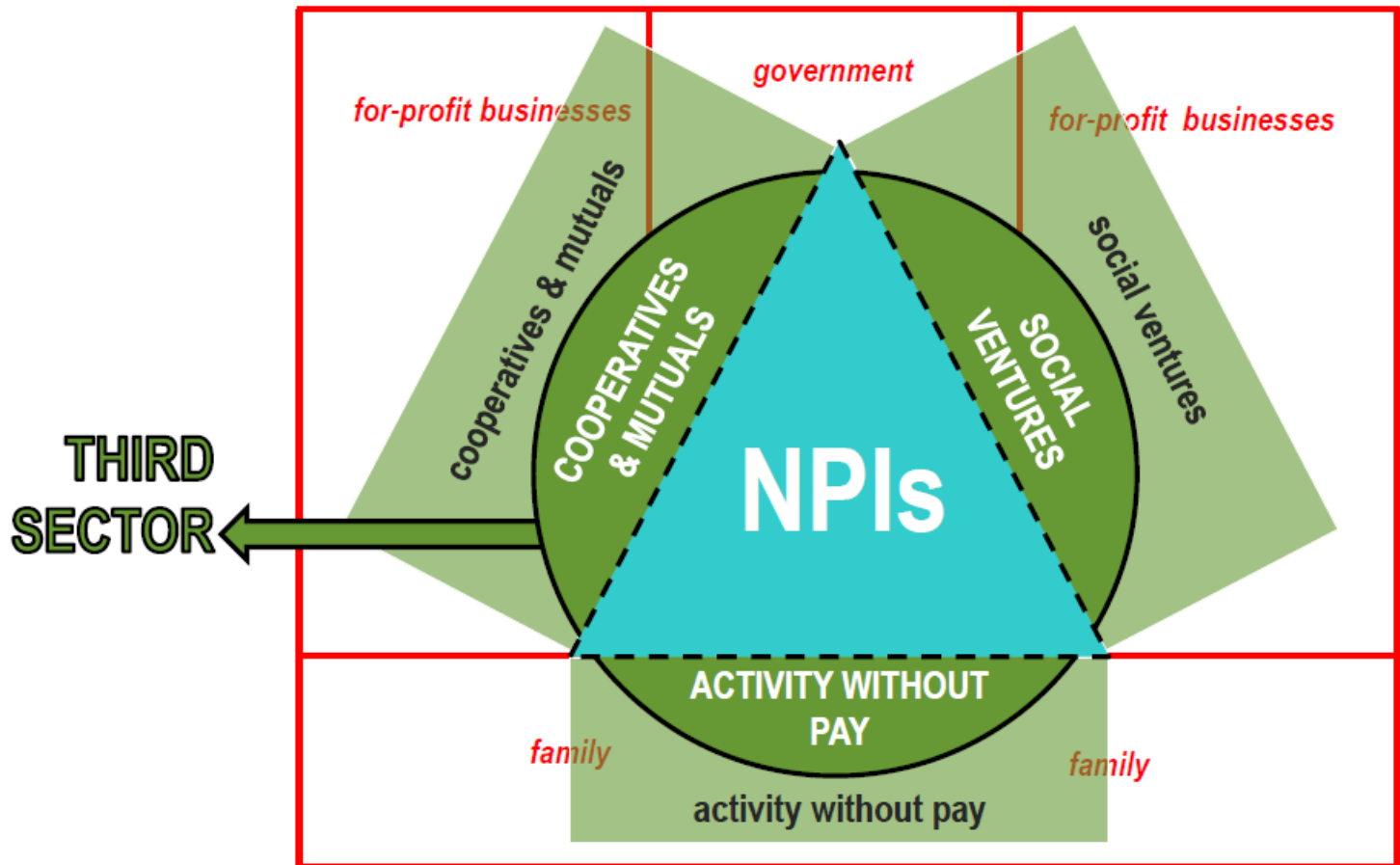


## 4. The way ahead : Methodology developments

➤ Recent developments:

- ✓ Increased relevance and visibility of Third Sector (Social economy, volunteer work,..)
- ✓ Analytical work and growing interest in measuring impact
- ✓ Cultural differences may have hampered faster recognition
- ✓ Civil society is highly valuing volunteer work which is growing in the Third Sector







## 4. The way ahead : Methodology developments

- Implications / refinements from the SNA 2008 or ESA2010
  - ✓ Several methodological changes
  - ✓ Enhancing the statistical relevance of SA and in particular of Social Economy
  
- Integration of new data sources (important consequence of developing Satellite Accounts namely Culture and Sports)
  
- Non Profit Institutions (changes in definitions and accounting treating, mercantile or not)
  - ✓ New Handbook on NPI will reflect certainly these changes

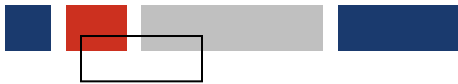




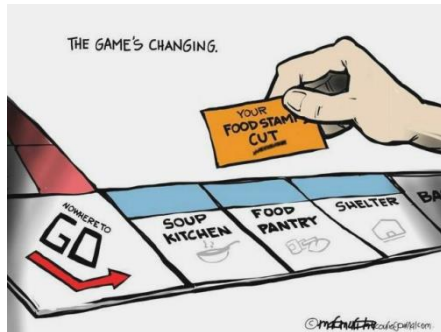
## 4. The way ahead : Methodology developments

- NPI in SNA different sectors (Non-Financial corporations; Financial sector, Government sector, Households, and NPISH)
- NPI as institutional units along with Corporations, Government Units, Households, broken down as:
  - ✓ NPI
  - ✓ Cooperatives & mutuals
  - ✓ Social Enterprises
- Broadened coverage and growing details





## Final remarks



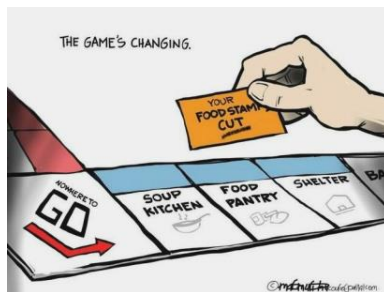
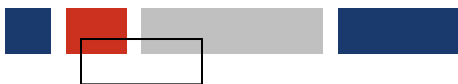
SASE = project in development

- international methodologies under development...
- concepts in discussion...
- new economic agents...
- ...



Understanding social economy...





My thanks to my colleagues, namely Cristina Ramos, head of Satellite Accounts Unit at Statistics Portugal

Thank you for your attention!

