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

2. Survey on Volunteer Work (2012)


4. The way ahead: Methodological developments
National Accounts:
Structured representation, simplified and coherent of the economic activity, allowing international comparisons
Satellite Accounts in Statistics Portugal

In development...

Environmental Protection Expenditure

Environmental goods and services

Energy

Agriculture

Forestry

"Routine" / concluded

Environmen

Health

Tourism

Non-profit institutions

Social Economy

Culture

Sea

Sports

National Accounts

2. Survey on Volunteer Work (2012)

3. Work in progress:

4. The way ahead...
<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
</tr>
</thead>
</table>
| Phase 1   | • National Accounts 2006  
• Non-profit institutions serving households (S15) |
| Phase 2   | • Satellite Account on Non-profit institutions 2006  
• Phase 1 + Other non-profit institutions |
| Phase 3   | • Social Economy Satellite Account 2010  
• Phase 2 + Cooperatives + Mutuels + Volunteer Work |

Methodology and conceptual framework

Satellite Account for Social Economy

Handbook on Non-Profit Institutions in the System of National (UN)+ Manual for drawing up the satellite accounts of companies in the social economy: co-operatives and mutual societies (CIRIEC)

European System of Accounts (ESA 95)

Main sources of information

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

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

National Accounts

Administrative data

Compilation process...

- Universe
- Economic account...
- Employment

Multi-dimensional

Industries / “ICNPO (adapted to social economy)”

“Groups” of entities of social economy

Institutional Sectors

Modular

- Cooperatives
- Mutuels
- Associations and OSEO
- Holly Houses of Mercy
- Foundations

Industries / “ICNPO (adapted to social economy)”

“Groups” of entities of social economy
Modular


- Institutional Sectors
- "Private Social Welfare Entities"
- "ICNPO (adapted to social economy)"
- "Groups" of entities of social economy
Social Economy Satellite Account
(April 2013):
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
  - ....
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 3ºQ 2012)

**Record time** (<1 year from conception to publication)

**Statistics Portugal**
(Several departments)

- National Accounts
- Social Statistics
- Informatics
- Statistical Methods
- Data collection

**Simplified version**

- 8 questions
  - Kind of Volunteer Work (formal/informal)
  - (regular/occasional)
  - Kind of organization
  - Tasks
  - Length
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?

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 VW (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.**
• **Volunteer rate**: 11.5%  
(1 million and 40 thousand volunteers)

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

2. Survey on volunteer work (2012)  
Main results in Sociodemographics

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**Volunteer rate, by sex and type of volunteer work**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Formal</th>
<th>Informal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>11.5%</td>
<td>5.9%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Women</td>
<td>12.7%</td>
<td>6.2%</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

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*Instituto Nacional de Estatística Statistics Portugal*
• **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%)
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](image)

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>Total</th>
<th>Formal</th>
<th>Informal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single</td>
<td>11.7%</td>
<td>7.5%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Married</td>
<td>11.9%</td>
<td>7.5%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Widowed</td>
<td>12.8%</td>
<td>5.6%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Divorced or Separated</td>
<td>11.9%</td>
<td>7.5%</td>
<td>4.3%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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*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

<table>
<thead>
<tr>
<th>Level of Education</th>
<th>Total</th>
<th>Formal</th>
<th>Informal</th>
</tr>
</thead>
<tbody>
<tr>
<td>No level of education</td>
<td>9.5</td>
<td>2.6</td>
<td>7.4</td>
</tr>
<tr>
<td>1st cycle of primary education</td>
<td>7.8</td>
<td>5.6</td>
<td>6.2</td>
</tr>
<tr>
<td>2nd cycle of primary education</td>
<td>11.8</td>
<td>6.5</td>
<td>6.1</td>
</tr>
<tr>
<td>Lower secondary education</td>
<td>14.7</td>
<td>14.5</td>
<td>7.4</td>
</tr>
<tr>
<td>Upper secondary education</td>
<td>3.4</td>
<td>8.8</td>
<td>5.8</td>
</tr>
<tr>
<td>Tertiary education</td>
<td>21.3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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2. Survey on volunteer work (2012)

Main results in Sociodemographics
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 chart](chart.png)
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

- 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).

Sources: Survey on Volunteer Work 2012 (PT); Eurobarometer 2011 (other MS)
Press release (April 2013):

Publications :

Social Economy Satellite Account (April 2013):

Labour Force Survey (May 2013):

Tables (April 2013):
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

Regular production of a satellite account for social economy in the context of the national statistical system...
### New partnership agreement…

<table>
<thead>
<tr>
<th>Compilation, analysis and disclosure of final results</th>
<th>• By the end 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Universe” (2013)</td>
<td>• Ongoing work</td>
</tr>
<tr>
<td>Preliminary report (ESA 2010, new UN HNPI, etc.) + workshop with main users</td>
<td>• March-July 2015</td>
</tr>
</tbody>
</table>

Good but… more detail, more timeliness…

2. Survey on Volunteer Work (2012)


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...
- Education
- Volunteer work
- Macroeconomic context
- Membership
- Inequalities
- Externalities
My thanks to my colleagues, namely Cristina Ramos, head of Satellite Accounts Unit at Statistics Portugal

Thank you for your attention!