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DISSEMINATION, MARKETING AND USE OF GENDER STATISTICS

Legal framework on gender statistics in Italy\*

Submitted by ISTAT, Italy

I. THE SOCIAL STATISTICS: A PREPARATORY HERITAGE TO THE  
DEVELOPMENT OF GENDER STATISTICS

1. For decades, in Italy, just as in almost all countries, the role given to statistical information has been linked to an idea of a system completely centred on governments' administration needs and economic actions (Rey, 1987). Despite the feeling already back in the 1950s that the statistical system was not quite adequate at following the social transformations, the awareness sank in only a few decades later that the traditional indicators, produced mainly from an economic point of view, no longer represent the social reality nor follow its changes in a satisfactory way (Sabbadini, Sgritta, 1997). As from the 1970s onwards, while the marginality of

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\* This paper has been prepared at the invitation of the secretariat.

the social statistics and of its key characters (women, old people, children, immigrants) started to decrease, public interventions in social contexts intensified and citizens expressed evermore new demands for life quality.

2. During the 1980s, the growing institutional demand for data and instruments that allow measuring the impact of social changes and of the public intervention policies, has led to an exponential growth of the statistical information in the social field<sup>1</sup>. New surveys have been developed and others enriched with new contents, thereby giving importance to the life quality of the citizens. Information on individuals is integrated with information relative to family groups, parental networks and to a wider social context, while the gender and the generation variables become irremissible for analysing the phenomena. The attention is no longer centred on individuals considered as components and parts of institutions or sectors of the social context (in the family, school, work, etc.) but rather on individuals considered as such, in the totality of the condition in which they live: no longer only housewives or workers but men and women; not only sons or schoolchildren but also children; not only retired but also elder people. All these changes have occurred all the while deep institutional changes have taken place. The inclusion of the Italian National Institute of Statistics in the scientific research sector and the foundation of a National Statistical System have created a more fertile ground for developing social statistics.

3. Thus, the fact of having overcome the invisibility of social subjects in the official statistics goes together with the evolution in the statistical system, which developed in accordance with the changes in society, economy and institutions. Such overcoming leads to completing the long process that eventually attributes to information all the dignity of a public asset, conferring it a strategic value not only due to the support it provides to the decision-making activities of public operators, but also for the choices of the citizens. Hence, the defence of the citizens' rights also includes a right to information and right to be represented by the official statistics in relation to their own needs, aspirations and behaviours.

4. Such evolution from a statistics completely centred on the needs of administrations and governments for managing the public welfare to a statistics focused on satisfying the informative needs of the citizens also requires data producers and users to be more sensitive as regards the differences recognizable in the plurality of the social groups, family forms and individual conditions. In this context, a growing attention is being given to the "gender statistics", which assumes the "gender" as variable necessary for comprehending the social phenomena.

## II. WHY A LAW ON GENDER STATISTICS

5. In 1995, the Italian Government committed to adjust the survey, production and diffusion of gender statistics in the economic, cultural and social contexts, together with the other countries adherent to the Platform for Action during the UN's World Conference on Women held in Beijing. In order to fulfil such commitment, and drawing its inspiration from the methods and suggestions formulated by the United Nations Institutions and by the European Union, some

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<sup>1</sup> In Italy, the Multi-purpose surveys on families are progressively becoming a real system of social surveys.

Bills have been introduced to promote and develop the realisation of such statistics, which, nevertheless, still has not seen its legislative procedure completed.

6. The bill introduced during the XIII legislature (March 4, 1999) by the President of the Council of Ministers (D'alema) and by the Minister for Equal Opportunities (Balbo) was the first legal proposal presented on this argument, becoming the source of inspiration to all subsequent bills<sup>2</sup>. The reason for resorting to a legal instrument derives from the need of providing stability to the gender methodological approach, which, in addition to presenting some strong innovative elements, must be delivered from any possible change linked to current events, in order to bind the availability of gender information of considerable public interest to precise periodicities.

7. Today, despite the increasing needs for higher gender details in the official statistical information, in Italy, just like in other countries, the statistical projects to which priority and assurance of being realised are given are those that derive, either directly or indirectly, from community regulations or directives (generally economic and national accounting statistics) and from national regulations. Consequently, some surveys and analysis studies, in non-covered areas and areas at strong statistical information demand, are still at risk, even though they would be essential for producing and defining gender policies and, more generally, social policies at various management and government levels.

8. In such context, the regulations for gender statistics development must be included in a wider strategy of social statistics development in order to guarantee an informative heritage that would represent a fertile ground to develop a gender methodological approach. In other words, the statistical production must take into account all the conditions that weigh differently on the situation of men and women, especially as regards the division of the roles, the access to material and/or cultural resources and to services and factors of social vulnerability.

9. According to this approach, the purpose of the afore-mentioned bill is to guarantee a more accurate and adequate analysis of the more important social phenomena from a gender point of view, giving particular attention to the need of developing new surveys on the life quality of the citizens. In fact, this measure aims at creating a sort of "virtuous circle" between social statistics and gender statistics, and at ensuring that this strengthening results in an overall improvement of the statistical information.

10. The presentation of the bill, which addresses the National Institute of Statistics (ISTAT) and all the National Statistical System organisations (SISTAN), stresses how the measure is made possible and opportune also thanks to the work of ISTAT. In its own decision-making context, ISTAT had indeed already boosted the gender statistics. Hence, it stresses the necessity

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<sup>2</sup> The bill (Official records of the Chamber nr 5771) was introduced again, without substantial variations, on parliamentary initiative, during the XIV and the XV legislatures (nr 1573 and nr 226).

of generalising and consolidating a method that has already been experimented, and of identifying the possibilities for development<sup>3</sup>.

### III. THE OBJECTIVES AND ACTIONS PROVIDED FOR IN THE BILL ON GENDER STATISTICS

11. The Bill intends on making recognisable the gender difference by following these specific objectives:

- a) Gender desegregation of all the statistical information produced by ISTAT (National Institute of Statistics) and by SISTAN (National Statistical System) and the same amount of visibility for both men and women;
- b) Systematisation of data collection in the various areas of public interest, and planning of new surveys on the life quality of foreign population too;
- c) Construction by ISTAT of a method for evaluating the gender impact of important norms;
- d) Development of gender research and analysis; planning of sensitive indicators for highlighting the gender differences.

12. These objectives involve the following actions:

- a) Desegregation per sex of all statistical information;
- b) Adjustment of the censuses' methods from a gender point of view, not only by desegregating the information gathered per sex but also by surveying data on households structures, both for the Italian population and for the foreign population regularly living in Italy;
- c) Carrying out of annual surveys on the life quality of citizens, of particular interest for the arguments pertaining to the gender difference. ISTAT has already been carrying out these surveys, though with different periodicity. The large areas identified are those of higher interest for studying the social life, such as fertility and mortality, employment and unemployment, poverty;
- d) Carrying out of five-year surveys in sectors of particular importance for the social statistics, which are rather stable. These sectors are those in which the most important changes occur over several years. The large areas of analysis are, for example, the health status, violence and abuse, time use;
- e) Restructuring of archives containing data relative to companies, with identification per sex of employees and owners;

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<sup>3</sup> To give an idea of the climate in which the Bill was conceived, in the same year in which it was introduced, in the enclosure to the Report to the Parliament on the activity carried out by the National Institute of Statistics, the Commission for the Statistical Information Guarantee, regarding the sector of official social statistics, praised the intensive activity carried out by ISTAT for providing greater visibility to gender statistics, and expressed hope that all the other subjects of SISTAN would develop a similar sensitivity.

- f) Quantification of the unpaid work by means of various methods, such as the satellite account indicated by the Platform of Beijing.

13. Moreover, this measure establishes that all the phases of the gender statistics production are to comply with the law on personal data protection<sup>4</sup>. Even though this measure regards the systems and methods of official statistics' programming, survey and diffusion, it is strongly hoped for that subjects and production centres of statistical information conform to the methods used by SISTAN (National Statistical System), and that the system of official statistics becomes a flywheel of deep and generalised innovation at a central and local level.

14. As we will see more in detail in the next paragraph, this Bill does not only recognise the need of developing gender statistics, but also provides precise indications to the producers of official statistics. It, indeed, identifies the areas of interest, the surveys and their periodicity, so that the statistical production may take into account all the conditions that weigh differently on the situation of men and women.

A. The articles of law

15. The Bill introduces article *I-bis* with provisions on gender statistics under article 13 of legislative decree nr 322 of 6 September 1989, containing directives on the National Statistical System and on the re-organisation of the National institute of Statistics.

16. According to the new article *13-bis*, the statistical information is to be produced by giving visibility to the gender difference and equal readability of data relative to men and women. In implementing objective 3, point 3.2, of the directive of the President of the Council of Ministers of 27 March 1997, and, as first step towards the generalisation of the evaluation method of gender impact as instrumental for adopting any government action, comma 2 provides that ISTAT prepares the methods for evaluating the impact of the important regulations.

17. Section *13-ter* states that the general population censuses are to ensure the desegregation per gender of the information, with reference to both the Italian population and the foreign one regularly living in Italy, and including the population living in institutes and communities. It indeed intends on providing a first indication of work to adjust the knowledge quality of social phenomena to the new phenomena linked to the cohabitation of various cultures and lifestyles.

18. Comma 2 also states that the general censuses on agriculture, industry and services are to ensure the desegregation of employees per sex and professional status, in order to allow also identifying the companies mainly run by women.

19. Article *13-quater* identifies the areas in which ISTAT and the other SISTAN organisations must produce statistical information broken down into men and women and at different periods. As regards the areas to be surveyed every year, the directive indicates

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<sup>4</sup> In particular as regards the regulation on sensitive data, as laid down in law nr 675 of 31 December 1996, and implementation legislative decrees of law nr.676 of 31 December 1996.

households structures; fertility; mortality per cause and morbidity; training and cultural fruition; employment, unemployment; poverty; social and political participation; use of public services. The areas to be surveyed every five year include: health status; disability, health behaviours; citizens' safety; violence and abuse; time use; solidarity networks and care work; social mobility. In the case of the non-annual surveys, it seemed best to provide for a mechanism that guarantees certain elasticity in identifying the periodicity. As all these surveys are rather complex and very important from a social point of view, the national statistical Programme can decide for a higher or lesser frequency.

20. As regards the production of current statistical information, the chambers of commerce, industry, craft and agriculture are to structure their archives holding all the data relative to the enterprises, especially the register of companies (as laid down in article 8 of law nr. 580 of 29 December 1993), providing for the desegregation per sex of the total employees and owners. This represents the first step to adjusting the administrative archives of other organisations and, consequently, of the statistical archives of ISTAT itself. Here too, one of the objectives of the directive is to identify the number of companies mainly run by women. Compared to the same directive on census, the adjustment of the register of companies will enable to evaluate the annual variations that affect the phenomenon.

21. Comma 5 of article 13-*quater* holds the prevision relative to unpaid work, which ISTAT will evaluate. It is important to underline that to quantify and to give value to unpaid work – of which the most important part is care work – have long been internationally indicated as the central objective for obtaining the exact social perception of the contribution women give to social life and to the production of wealth. This will also allow quantifying the level of sharing of family responsibilities.

22. Comma 6 of article 13-*quater* states that ISTAT and the other SISTAN organisations are to rationalise the modules according to the modalities already set in the legislative decree nr 29 of 1993.

23. In fact, by diffusing common methods and standards, harmonising the administrative archives, valorising the organised public and private sources (archives, registers, computerised registers, databases), and by modifying the modules already in use or its setting, the existing information offer could already be directly produced with the necessary gender differentiation.

24. These data could also be collected by means of administrative documents from the administrations' institutional activity or by means of public and private organised sources. As regards the physical persons, the sex and the age of the persons as structural variables of population units are, in almost all the cases, already provided for in the questionnaire or administrative document, and thus, enable a statistical treatment for producing statistics desegregated per gender.

25. Article 2 of the Bill states that the President of the Council of Ministers or the Ministry for Equal Opportunities must refer every year to the Parliament on the state of implementation of the laws on gender statistics. The innovations deriving from the methods indicated require indeed a careful and constant monitoring, in order to bring any correctives or introduce further

new elements if necessary. For this purpose, every year, ISTAT has been preparing special recognitions.

26. In order to give to the organisations addressee of these directives the time necessary for carrying out the needed adjustment in the methods and equipments, article 3 of the Bill establishes a three-year term for implementing the fulfilments that fall under ISTAT and SISTAN responsibilities.

27. Finally, it is important to bear also in mind the Bill introduced on initiative of the National Council for Employment and Economics, which contains Directives on gender statistics, introduced on October 25, 2004 and re-introduced during the current legislature on May 3, 2006. This Bill, which substantially proposes again the previous Bill, does present some new elements. In particular, article 3 provides for the institution of a consultative Committee<sup>5</sup> for gender statistics at the Presidency of the Council of Ministers – department for Equal Opportunities –and whose task will be to

- a). Formulate proposals for harmonising the gender-sensitive indicators and methods with those used by the international organisations;
- b). Favour and promote the realisation and diffusion of gender statistics, even through the census of all researches and publications of interest for the official statistical information relative to the National Statistical Programme, realised even by subjects not part of the National Statistical System;
- c). Carry out recognitions of the law in force aimed at surveying any obstacles in producing gender statistics, proposing the necessary modifications;
- d). Formulate suggestions and proposals in order to identify new informative needs, emerging topics and analyses, researches and methods of particular interest from a gender point of view.
- e). Prepare every year a report on the activities carried out and on the activities to be carried out the next year.

28. At last, article 4 deals with the integration of the Relation on actions supporting economic and productive activities and the relative surveys enclosed to the economic-financial programming document, with illustrated statistical appendixes of the impact analysis of the facility directives on beneficiary subjects broken down into men and women and per age.

29. Here too, as in the 1999 Bill, the law gathers among its articles the evaluation of gender impact as element indispensable for elaborating and adopting government actions. The development of statistical surveys desegregated per gender and surveys that allow highlighting problems linked to gender difference are recognised as instrumental for the impact evaluation, and thus, for the elaboration of explicit policies aimed at equal opportunities.

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<sup>5</sup> The Committee is made up of a representative of the Presidency of the Council of Ministers – Department for Equal Opportunities – which presides it, by two representatives nominated by the National Council for Employment and Economics (CNEL), indicated by the Social Parties, by two representatives of ISTAT and by two experts.

#### IV. A LAW ON GENDER BUDGET

30. The most important application of the evaluation method of gender impact concerns the gender budgets, which were first experimented in Australia and in South Africa in mid-1980s, and, subsequently, in the industrialised countries (Australia, Canada, Great-Britain, USA, Italy, etc.) and in the developing countries (Barbados, Fiji, Kenya, Mozambique, Tanzania, Zambia, Zimbabwe, etc.).

31. The concept and method of gender budgeting became known and established through the Platform for Action during the Fourth World Conference on Women held in 1995. The Platform's strategic objectives for governments included the promotion of more transparent budgetary procedures at various levels to integrate the gender perspective in budgetary programming and policies, as well as the funding of programmes for equal opportunities between men and women.

32. The European Union too introduced the gender budget among the political instruments for equal opportunities through the European Parliament Resolution (2003) 0323 of 3 July 2003.

33. The relation that accompanies the proposal of such Resolution, states that “...*whenever they define revenue and expenditure policies, public budgetary authorities at all levels are taking policy decisions. Budgets are not merely economic tools but in fact key instruments with which political authorities shape a society's model of socio-economic development and criteria for internal redistribution, and prioritise the measures to be taken in respect of policies and the needs of their own citizens. The impact this has is not the same on men and women*”. Public budgets do not represent neutral instruments, as they in fact reflect the disparities already present in society. Public budgets drawn up without using a gender approach: “...*ignore the differences – in terms of roles, responsibilities and capabilities – between men and women... Although they are presented as neutral economic instruments, public budgets in actual fact reflect and thus reproduce the socio-economic disparities already present in the Community*”.

34. In other words, to build a gender budget means to be able to verify the efficiency and efficacy of budget expenses in relation to the objectives established, and in particular as regards the distribution of the resources and services for men and women.

35. Unlike some other countries where gender budgets were implemented through national legislation, in Italy, the local Institutions (Provinces and Municipalities) have started a series of experiments, increasing pilot experiences and organising numerous gender budget-related seminars, conventions and debates. The need of developing gender budgets was recently felt on a legislative level too (December 2005). The Bill 'Provisions for instituting gender budgets for central government' was introduced (and re-introduced in 2006 during the new legislature), thereby agreeing with the European Parliament's invitation to equip the country with such social accounting instrument.

36. The Bill, which reflects the purposes held in the European Parliament resolution, specifies that building a public budget from a gender perspective means (article 2):



- identifying how different citizens benefit from public expenditure and contribute to public revenue, highlighting the difference between women and men by using qualitative and quantitative data and benchmarking,
- evaluating the different impact on women and men of budgetary policies and redistribution of resources in terms of money, services, time and work of social and family care/social reproduction,
- analysing gender impact in all sectors of public intervention and incrementally introducing gender budgeting in all policies, including education, welfare and social services, health assistance, actions and measures for employment, transport, housing, etc.
- developing a bottom-up budgetary process and promoting the involvement and participation of all citizens - men and women - and actors concerned with the aim of identifying different specific needs and appropriate policies and measures to respond to them,
- verifying that the allocation of resources corresponds in an appropriate and equal manner to the different needs and demands of women and men,
- ensuring that gender analyses and impact are thoroughly taken into consideration in all phases of the budgetary process, including project, definition, implementation, monitoring and evaluation,
- using public budgets to define meaningful political priorities and identify specific tools, mechanisms and actions in order to achieve equality between women and men through public policies,
- redefining priorities and reallocating public expenditure without necessarily increasing the total amount of a public budget,
- verifying/accounting for the efficacy and efficiency of public expenditures in respect of established priorities and commitments, in general terms, and, specifically, with regard to respect for equal opportunities between women and men in the re-distribution of public resources and services;

37. After identifying the gender budget and its purposes (article 1), it enjoins

- The general government to progressively adjust its own budgets from a gender perspective, offering suitable training courses for personnel whose task will be to implement such budgets (art. 2);
- The Minister of Economy and Finances to issue a decree that contains regulations and methods useful for planning and realising public gender budgets (art.3);
- The Court of Accounts to be involved in verifying that the general government has indeed correctly applied the law (articles 4, 5 and 6).

38. Article 4 of said Bill also provides for the institution, at the Court of Accounts, of a databank Observatory on the general government's gender budgets, from which equality advisors and interested administrations may draw information and data. Finally, in case the general government does not fulfil its obligations and whose violation has indeed been assessed jurisdictionally speaking, the Bill states that it cannot hire new personnel nor personnel part the protected categories. A proposal was made to appoint the Court of Accounts as subject for controlling and for applying the sanction, where necessary.

## V. CONCLUDING REMARKS

39. As from the 1990s', the National Institute of Statistics has greatly invested in the development of gender statistics, making available its very rich informative wealth, fundamental for planning equality policies. Nevertheless, gender statistics, just as the social statistics, are currently undergoing a phase of strong criticality, not only in Italy but elsewhere too. At the national level, increasing the coverage of statistics on gender issues is particularly challenging in view of the human and financial resource constraints faced by most national statistical systems. In absence of national and international regulations, which, though, are often issued as far as the economic and national accounts statistics are concerned, funding for this particular statistics production sector is constantly at risk of cutback. In the long term, to improve the lives of women and men, statistical systems and budgets at the national as well as international level must bring about the sustained and institutionalised change needed to ensure the availability of quality gender statistics.

40. In Italy, the awareness that the gender statistics are at risk of going backwards, has urged political forces to introduce bills that equip gender statistics with an adequate legal support. Even though the Bill's legislative procedure has still not been completed, the insistence with which the bill is re-introduced shows how the time is ripe for definitively passing it.

41. Besides, to provide an adequate support to the gender statistics development is indispensable in order to ensure all the information necessary for evaluating gender equality impact as regards the gender budgeting application (accompanied by specific statistics broken down by gender, and indicators and benchmarks on equality between the sexes). The strategic role of gender budget, fundamental for reaching equality between men and women, has been recognised transversely by political forces. By approving such Bill, whose intention is to lay the bases for its diffusion, Italy will be able to make a further fundamental step in the application of Beijing's Platform.

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