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Past and current efforts towards a systematic development of social statistics<sup>\*</sup>

Prepared by

United Nations Statistics Division<sup>\*\*</sup>

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# Past and current efforts towards a systematic development of social statistics

## I. Why refer to the past?

1. Before setting out to deliberate on future actions, it is important to pause and recall the numerous initiatives and activities which have been carried out in the area of social statistics in the past. Although the understanding of social statistics may have changed over time, many key elements remain. How can these help us define future directions? What lessons can we learn from past efforts?

2. This paper aims at providing the expert group meeting with a starting point for defining a way ahead in developing concepts and methods for social statistics. The rationale for this is twofold. On the one hand, readers who are not familiar with the chronology of events may benefit from a synthetic overview of how ideas and approaches have evolved and changed in social statistics over the past five decades. On the other, it is motivated by the need to maximise efficiency. Given the short time frame available for discussion, it is imperative for the expert group to be focused and action-oriented. Any previously acquired knowledge, therefore, should be made available to the expert group to assist in planning future activities.

3. This paper does not attempt to review all of the initiatives<sup>1</sup> that have been undertaken in social statistics at the international level, but rather it tries to identify some of major features and characteristics and group them accordingly into phases<sup>2</sup>. Sections II to VI provide a brief chronological overview of some of the major developments that took place with regard to these phases and draw attention to the major strengths and weaknesses of these phases as expressed by the Statistical Commission<sup>3</sup> or by other documents submitted to the Commission. The last two sections present some of the differences and similarities between these phases as well as the major lessons learned. Figure 1 offers a synthetic overview of some of the initiatives reviewed in this paper.

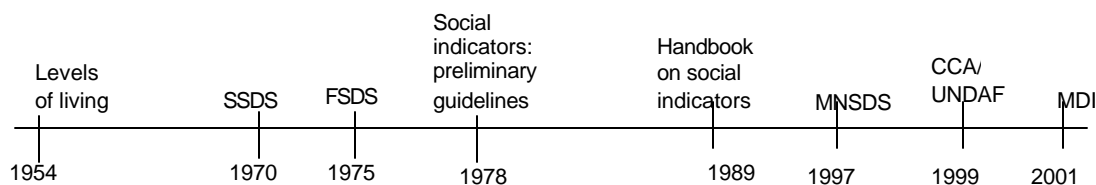
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<sup>1</sup> The paper focuses exclusively on initiatives that adopted a comprehensive and overarching outlook on social statistics. The sectoral work, which focused exclusively on one specific field (such as health, education, etc.) or population subgroup (such as disabled persons, the elderly, etc.), is therefore, not examined in this paper.

<sup>2</sup> It should be noted that the various initiatives and approaches did not develop in an isolated fashion, but often were influenced and inspired by each other. The Systems of Social and Demographic Statistics (SSDS), for example, was strongly influenced by the work of the Organisation for Economic Co-operation and Development (OECD) on indicators of well being and levels of living (United Nations, 1974a, para. 1.15). Likewise, some of the momentum for the social indicator movement was provided by the need to integrate the work on the Framework for Social and Demographic Statistics (FSDS) (United Nations, 1978a, para. 1.1). Consequently, it is not always easy to identify strictly distinct phases.

<sup>3</sup> The paper focuses exclusively on activities that have been brought to the attention of the Statistical Commission. This choice was made both because it offers a consistent historical setting for reviewing past initiatives and approaches and because it ensures that the activities reviewed are of comparable relevance.

**Figure 1. Overview of some of the initiatives in social statistics reviewed in this paper<sup>4</sup>**



Note: The time line is not drawn to scale

## II. Measurement of levels of living and the component approach

4. The first initiative reviewed in this paper is the groundbreaking report<sup>5</sup> “International definition and measurement of standards and levels of living”, which was presented to the Statistical Commission in 1954 (United Nations, 1954a, para 73). This report, which advocated the so-called “component approach” (United Nations, 1954b, para 18), aimed at measuring levels of living through a series of twelve components<sup>6</sup>. The components were identified in such a way as to touch on all aspects of levels of living (United Nations, 1955, para 18). These included physical well-being, related material elements such as consumption, as well as “non-material” factors such as the satisfaction of cultural or educational needs, etc. (United Nations, 1954b, para 11). The Committee recognised that in order to be able to make comparisons of levels of living, both between individuals and at an international level, it was necessary to assume that certain values were the same for all individuals or differed in a known way (United Nations, 1954b, para 15). The Committee agreed that only certain fundamental, generally accepted needs would be treated, without necessarily taking into consideration the needs of the individual.

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<sup>4</sup> The various acronyms indicate the following:

SSDS = System of Social and Demographic Statistics

FSDS = Framework of Social and Demographic Statistics

MNSDS = Minimum National Social Data Set

CCA/UNDAF = Common Country Assessment /United Nations Development Assistance Framework

MDI = Millennium Development indicators

<sup>5</sup> See Becker et al. (2000)

<sup>6</sup> The twelve components are:

1. Health, including demographic conditions
2. Food and nutrition
3. Education, including literacy and skills
4. Conditions of work
5. Employment situation
6. Aggregate consumption and savings
7. Transportation
8. Housing, including household facilities
9. Clothing
10. Recreation and Entertainment
11. Social security
12. Human freedoms

5. For each of these components, the Committee identified a number of specific indicators (United Nations, 1954b, para 19). The Committee of Experts recognised that no unitary indicator could convey the totality of the levels of living concept or, alone, serve the purpose of international comparison. Furthermore, the Committee noted that indicators referred to only a part of the total level of living and that even the indicators available for a given component (such as health, education, etc.) did not yield a complete measurement of that component and were not additive (United Nations, 1954b, para 20). It also noted that many of the available indicators did not actually measure levels of living but rather means and facilities (such as number of schools or school teachers) (United Nations, 1954b, para 22). The Committee proposed supplementing these figures with data on utilization of services and facilities.

6. It is interesting to observe that much of the subsequent work on social indicators can be traced back to this groundbreaking report. Although the report focused on levels of living rather than social statistics, it outlined a number of key principles that are still being used today. It established, for example, that indicators have to be collected in relation to a number of areas or components, which in turn have to respond to certain policy needs. It also recognised that individual indicators do not in themselves offer an overview of the overall concept being measured (such as levels of living), but have to be seen as complementary to each other. The report helped establish a hierarchy among the various indicators and identify a limited set of indicators of primary importance. Finally the report outlined a number of steps for improving the quality of the underlying data and promoting statistical capacity in relation to the various components and indicators.

7. The Commission generally welcomed this report and requested that further work be undertaken. This led to a flurry of initiatives aimed at strengthening methods for collecting, compiling and analysing the basic series necessary to produce social indicators.

8. At its tenth session in 1958, for example, the Commission emphasized the need for “special studies concerned with the development of operational concepts and with methods of collection and analysis of data likely to provide indicators and integrated measures, for assessing changes in levels of living, for measuring economic and social policies and for evaluating the results of such policies” (United Nations, 1958, para. 107).

9. In 1962 the Commission welcomed the development of statistical indicators of housing conditions, one of the twelve components required for measuring levels of living (United Nations, 1962a, para 82). It also acknowledged the important progress on the *Handbook of household surveys*, which had been undertaken primarily to assist developing countries in obtaining information on levels of living (United Nations, 1962a, para 89).

10. The preparatory work for the 1970s round of population and housing censuses also represented an important development. In 1965, for example, the Commission recognised that the World Housing Census Programme would provide useful information for the calculation of the housing components of levels of living (United Nations, 1965, para 139).

### III. System of Social and Demographic Statistics (SSDS)

11. The System of Social and Demographic Statistics (SSDS)<sup>7</sup> developed out of an attempt to establish, in the demographic area, a framework parallel to the system of national accounts (United Nations, 1970c and 1972b). Instead of money flows, the system of demographic and manpower statistics dealt with flows of people. This approach was prompted by the perceived desirability of establishing a closer relationship between social and economic statistics, particularly those relative to the system of national accounts (United Nations, 1965, para. 169). The first draft of the SSDS was submitted to the Statistical Commission in 1970. Initially it was titled “A system of demographic, manpower and social statistics” (United Nations, 1970b). In 1972 the term “manpower” was dropped from the title and the system was renamed “System of Social and Demographic Statistics”.

12. The SSDS was designed to link information on stocks and flows of individuals and groups of individuals to economic information and in particular the provision of services. The information on individuals was organised in matrixes, while the economic information, which encompassed the distribution of income, consumption and accumulation, was organised as an extension of the System of National Accounts (United Nations, 1979b). Time accounts were also included in the system, along with regional information. The system consisted of eleven subsystems, which together comprised the scope of the SSDS<sup>8</sup>. The SSDS contemplated linking these various subsystems through a network of consistent classifications, definitions and concepts. The use of record linkages and longitudinal data was also advocated.

**Table 1. The eleven subsystems of the SSDS**

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1.	The size and structure of the population, births, deaths and migration
2.	Family formation, families and households
3.	Social class stratification and mobility
4.	Distribution of income, consumption, accumulation and net worth
5.	Housing and the environment
6.	Allocation of time and the use of leisure
7.	Social security and welfare services
8.	Learning activities and educational services
9.	Earning activities, employment services and the inactive
10.	Health and health services
11.	Public order and safety, offenders and their victims

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<sup>7</sup> The key to understanding the SSDS lies in the term “connectedness”. According to Stone, the author of the SSDS, connections can be made in a number of ways including uniform definitions, common classifications, and present and past characteristics of individuals (United Nations, 1974a, para. 1.24-1.25). The separate collection of data (on, for example education, labour, health, etc.) does not constitute a system because “insufficient provisions are made for various kinds of connexion within the different parts and very little is made for any connexions between them” (United Nations, 1974a, para.1.5).

<sup>8</sup> The SSDS excluded three important topics, which Stone thought should be considered at a later date. These were: the environment; feelings and attitudes; and politics.

13. Moser who contributed to the widely acclaimed<sup>9</sup> review “System of Social and Demographic Statistics (SSDS): potential uses and usefulness” noted that one of the original aspects of the SSDS was that it accentuated the need for linkages and consistency from one field to another (United Nations, 1979a, para. 110). According to Moser the SSDS had identified three components “(i) inputs, (ii) principles and techniques of methodology; and (iii) outputs.<sup>10</sup> ... What needed to be emphasized was the middle link: a network of common or consistent classifications and the application over the whole range of social statistics of principles for structuring data” (United Nations, 1979a, para 111).

14. The Commission generally favoured Moser’s approach as it felt that the SSDS “should not be considered as a set of pre-planned tables which had to be filled out, like the SNA” (United Nations, 1974c para 72). There was intense debate at the time whether the SSDS should be taken as a set of principles relating to comprehensiveness, harmonization, and connectedness. Many objected to this approach stating that it would reduce the SSDS to a mere programme of harmonized social and demographic statistics (United Nations, 1974c, para 72).

15. The Commission considered that the study of specific population groups, such as the elderly, the poor or the disabled, could be one of the important contributions of the SSDS and that a valuable way of testing the feasibility of this approach at the country level was to focus attention on specific population groups rather than on subsystems (United Nations, 1974c, para 73).

16. There was also a widespread view that the full version of the system was too complex; that some of the concepts and series of the system were not suited to the circumstances of developing countries; and it was impracticable for those countries to develop a number of parts of the system in the foreseeable future (United Nations, 1972a, para 116). The Commission stressed that future work should give priority to the needs and problems of developing countries and that all efforts should be made to produce flexible methods.

17. Out of this discussion two somewhat different views on the desirable direction of future work emerged. On the one hand, there was the opinion that work should proceed on designing a simplified version of an SSDS for developing countries because the full version was too complex for the purpose. On the other hand, that the SSDS should be viewed simply as a process of systematisation and that the immediate objective was to improve, restructure and harmonize social statistics, keeping the full SSDS as a long-term goal and using it as a frame of reference (United Nations, 1974c, para 82).

#### **IV. Framework for Social and Demographic Statistics (FSDS)**

18. In 1975 the expert group convened to discuss the implications of developing a simplified version of the SSDS for developing countries recommended modifying the term “system”, which was perceived as being too rigid, and proposed substituting it with the term “framework”. This

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<sup>9</sup> “The Commission unanimously commended the report, which it found very useful in clarifying the basic nature of the SSDS, and its potential uses” (United Nations, 1974c, para. 69)

<sup>10</sup> In this paper the inputs are indicated as the basic data series; the principles and techniques of methodology include, among others, linkages, aggregation and classifications; while the outputs consist of tabulations, indices, projections, etc. (United Nations, 1979b, para 13).

group advocated that the overall approach should not be the elaboration of a set of subsystems within a unified system, but rather the identification of a number of fields of statistics, unified through common classifications and other linkage devices (United Nations, 1976b, para 11). The end result was the technical report *Improving social statistics in developing countries: conceptual framework and methods* (United Nations, 1979c), which outlined a conceptual framework setting forth the scope and desirable priority areas of an integrated framework.<sup>11</sup>

19. The Commission paper titled “Role of macro-data and micro-data structures in the integration of demographic, social and economic statistics: report by the Secretary-General” (United Nations, 1981b) took the FSDS further and argued that “what distinguishes a framework from a disjointed list of statistical series is structure and coherence. Such a framework requires, in the first place, the use of consistent classifications and definitions throughout the entire body of statistics. In the second place, it requires the development of suitable aggregates” (United Nations, 1981b, para 15). This report rejected the traditional practice of identifying a limited list of time series; warning that a framework constructed this way ran the risk of early fossilisation (United Nations, 1981b, para 16). Instead it supported the idea of a framework as a structure to which any and all data could be attached, as long as they related to the reporting units or their subunits.

20. Although a number of members of the Commission found this report highly interesting, others considered the programme to be ambitious, vast and for the very long term. In practical terms, the difficulties lay in the intractability of the data and in the fact that, inevitably, different data systems would have to exist side by side (United Nations, 1981a, para 137).

21. The work on the FSDS led to a number of initiatives aimed at improving the quality of social indicators and underlying data. An example of this is provided by the “Draft guidelines on age-group classifications” (United Nations, 1981c) and the report “National practices in classifications of size and type of locality and urban/rural areas” (United Nations 1981d), which were brought before of the Commission in 1981 as a result of the work on co-ordinating statistics within the FSDS (United Nations, 1981a, para. 123-126 and 128-133).

22. The report *Social indicators: preliminary guidelines and illustrative series*, which was published in 1978, represents another outcome of the work on the FSDS. This report provided a set of examples of social indicators, based on illustrative series and classifications commonly used in demographic, social and economic statistics (United Nations, 1978a). It emphasised that the long-term effectiveness and soundness of social indicators could be improved if they were developed within the context of a framework for integration.

23. Despite these provisional guidelines, many representatives expressed considerable concern about the lack of comparability among internationally published indicators. In this respect the Commission noted that the international recommendations for population and housing censuses could provide a central core of social and related statistical topics, and that these recommendations could serve as a useful starting point for the development of indicators for international use (United Nations, 1985, para 24).

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<sup>11</sup> The report encouraged developing countries to adopt a two-tiered approach, with the first tier corresponding to their most immediate policy needs (such as population, employment, income, health, etc.) and the second encompassing other areas such as social stratification, families and households, public order and safety, etc. (United Nations, 1979c, para. 41, page 32).



24. In 1989 the publication of the *Handbook on social indicators* provided an additional conceptual and practical tool for countries and international organisations engaged in developing social indicators (United Nations, 1989b). The scope of this *Handbook* was limited to the development and definition of indicators within the context of the FSDS (United Nations, 1989b, page iii). It also supported, in line with the *Preliminary guidelines*, the development and utilisation of basic data sources and the harmonisation of the underlying statistical concepts, classifications and definitions, rather than the development of parallel, ad hoc data sources and concepts (United Nations, 1989b, page 1).

## V. Moving towards social indicators

25. The work on the SSDS had opened up a debate within the Statistical Commission on the relationship between indicators and the overall system. A particular issue of contention was whether indicators should be viewed as outputs of the overall system or whether they should be developed in relation to specific policy needs.

26. The SSDS had endorsed the former approach by recognising that social indicators were only one of many possible outputs. More specifically, indicators were perceived as a subset of all the data series and constructs potentially available, distinguished from the other statistics only on the basis of their suitability and relevance (United Nations, 1974a, para 5.8). The SSDS advocated that the work on social indicators should fall within the overall framework for the integration and analysis of social statistics, and dispelled the notion that a “system” of indicators could be established in parallel to the work on the overall framework (United Nations, 1979c, para 31, page 30).

27. In 1972 the Commission was presented with the report “A system of demographic and social statistics and its links with the system of national economic accounts” (United Nations, 1972b). In this document social indicators were conceived as summaries of the basic series of the system. A number of members of the Commission felt that this concept was too broad and that social indicators should be thought of as series related to specific policy goals and social concerns. They argued that the series should be derived from policy goals and concerns rather than from the elements of the system (United Nations, 1972a, para 113).

28. In 1985 the debate on whether work on an overall system should be considered an essential element of the work on social indicators, or whether social indicators should be developed for specific purposes without reference to a fixed general framework continued (United Nations, 1985, para 22). Some members were of the opinion that initiatives to develop an overall system and systematize social and related statistics and indicators should be considered an essential element in the work on social indicators. Others suggested that social indicators for specific purposes –for example, concerning special population groups or policy concerns –could be developed from underlying basic statistics without reference to a fixed general framework. The Commission concluded that a pragmatic approach, oriented towards user needs should have priority, but that co-ordination and improvement of the underlying data should proceed in parallel, and that a detailed overall system was clearly impractical.

29. This argument resurfaced at the twenty-fifth session of the Commission in 1989, when the importance and feasibility of developing a conceptual framework for integrated social statistics and

for indicators was further discussed (United Nations, 1989a). Some members felt that little progress could be made until such a framework was developed. The Commission agreed that a simple, flexible framework was a necessary and reasonable approach in the absence of a rigorous system.

## VI. Indicator lists

30. One of the major contributions of the report “International definition and measurement of standards and levels of living” was that it helped establish a hierarchy among the various proposed statistical measures and identified a limited set of indicators of primary importance (see Table 2).<sup>12</sup> This set was not intended as a prescriptive list, but rather as a means for assisting countries in prioritising the development of data on levels of living (United Nations, 1954b, para 139).

31. Since then, several other initiatives have adopted this approach. The 1979 report *Improving social statistics in developing countries: conceptual framework and methods* stated that a “minimum” list of statistical series and classifications might form the heart of a multicultural national effort at improving social statistics (United Nations, 1979c). Although this publication did not support the idea of an international minimum list of social indicators, it encouraged countries to choose their own indicator list from a broader range of illustrative series and classifications according to national priorities (United Nations, 1979c, para 40-41, pages 13-14). In 1989 the Commission reiterated this approach by stressing that developing countries should focus on a minimum core of indicators necessary for policy making to avoid diffusion of efforts (United Nations, 1989a, para 137). In this respect, the *Handbook on social indicators* offered a list of 14 illustrative formats for basic tables for indicators (United Nations, 1989b, page 86).

**Table 2. The “principal indicators” identified in the 1954 report “International definition and measurement of standards and levels of living” and the Minimum National Social Data Set (MNSDS)**

Principal indicators of levels of living (1954)	MNSDS (1997)
1. Expectation of life at birth	1. Life expectancy at birth, by sex
2. Infant mortality rate	2. Infant mortality, by sex
	3. Child mortality, by sex
	4. Maternal mortality
3. National average food supplies in terms of calories at the “retail level” compared with estimated calorie requirements	5. Monetary value of the basket of food needed for minimum nutritional requirement
4. Proportion of children 5-14 years of age enrolled in schools	6. Average numbers of years of schooling completed, by urban/rural, sex and, where possible, by income classes
5. Percentage of population literate, above some appropriate age, total and by sex	

<sup>12</sup> The report also identified three synthetic indicators that were to be considered of equal priority (United Nations, 1954b, para 139). These were:

1. The items listed under “national income data”;
2. The ratio of the index of change in national income (in constant prices) to the index of change in population (equals index of change in per capita national income);
3. Average expectation of life (at birth and at various ages).

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>6. Proportion of economically active population unemployed</li> <li>7. Percentage distribution of economically active population by principal industrial and occupational categories</li> <li>8. “Personal consumption” as a proportion of national income and index of change therein</li> </ul> | <ul style="list-style-type: none"> <li>7. Unemployment rate, by sex</li> <li>8. Employment-population ratio, by sex and, where appropriate, formal and informal sector</li> <li>9. GDP per capita</li> <li>10. Household income per capita (level and distribution)</li> <li>11. Number of people per room, excluding kitchen and bathroom</li> <li>12. Access to safe water</li> <li>13. Access to sanitation</li> <li>14. Population estimates by sex, age and where appropriate and feasible, ethnic group</li> <li>15. Contraceptive prevalence rate</li> </ul> |
|--|---|
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32. Probably the most widely recognised example of an indicator set is the Minimum National Social Data Set (MNSDS), a list of 15 indicators that was developed in response to the 1995 World Summit for Social Development and other United Nations conferences such as the 1994 International Conference on Population and Development and the Fourth World Conference on Women (see Table 2).<sup>13</sup> The Expert Group, convened in 1995 to discuss the statistical implications of the major United Nations conferences, encouraged the adoption of such a list as a means to ensure that each country had the capacity to produce a small number of crucial indicators (United Nations, 1996, para. 91). The Commission adopted this set in 1997 and countries were encouraged to use it for national and international reporting and monitoring by regularly collecting the appropriate data disaggregated by sex and major age groups. Besides this basic core of 15 indicators, the MNSDS also included a broader list of indicators and policy concerns, grouped according to five major policy areas. This broader set was intended as a menu from which countries could select data items of the highest national priority (United Nations, 1996, para. 93). In 1999 the Commission recognised that the MNSDS was a useful set that could provide guidance to countries interested in developing a basic social statistics system (United Nations, 1999a, para 92, d).

33. In 1998 the Administrative Committee on Coordination (ACC) Subcommittee on Statistical Activities endorsed the proposal of the United Nations Statistics Division to begin work on the rationalization and harmonization through the United Nations Development Assistance Framework (UNDAF) of the indicators for the Common Country Assessment (CCA), and to continue its work with the core indicators programme of the Development Assistance Committee of the OECD (United Nations, 2000, para. 4). The need for the multilateral system to develop a coherent set of basic indicators to monitor progress in the implementation of conference goals at a national level, as well as the need to strengthen the capacity of countries and of the United Nations system to collect and analyse statistics (United Nations, 1999b, para. 23) led to the creation of the CCA indicator framework (United Nations, 2001, para. 6). It included a list of 50 qualitative and quantitative indicators on a range of demographic, social, environmental and economic issues, as well as human

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<sup>13</sup> It is important to note that, although the MNSDS basically arrived at the same outcomes as the 1954 work on levels of living, the latter had been temporarily forgotten while the expert group was discussing the MNSDS (Becker *et al*, 2001).

rights and governance. These indicators were grouped according to four components (United Nations, 1999c).<sup>14</sup>

34. In 2000 the General Assembly adopted the United Nations Millennium Declaration, and suggested a roadmap for the implementation of the declaration consisting of concrete targets and goals (United Nations, 2002c, para 8). To help track progress in relation to these goals the United Nations agencies, funds and programmes, as well as the International Monetary Fund (IMF), the World Bank and the OECD, derived from the Millennium Declaration a framework of eight goals, 18 targets and 48 indicators (United Nations, 2003, para 14 and 2002c, para. 8). The previous work on the UNDAF/CCA indicators was used as reference in identifying these indicators (United Nations, 2003, para 14). In 2002 the Statistical Commission endorsed furthering work on this set and recommended that harmonization and rationalization of indicators was needed (United Nations, 2002a, para. 66, d).

35. In 2002 the Commission was presented with the report ‘Report of the Friends of the Chair of the Statistical Commission on an assessment of the statistical indicators derived from United Nations summit meetings: note by the Secretary-General’ (United Nations, 2002b). This report identified a limited list of indicators, which were to serve as an indicator framework containing three priority tiers.<sup>15</sup> Each tier contained about 50 statistical indicators. The framework was designed to reflect the major policy areas of the various United Nations conferences and summits. The Commission welcomed this “indicator architecture” (United Nations, 2002a, para. 66, a), recognizing that it would help coordinate the work on indicators. In 2003 it was suggested that the full list of the millennium development indicators should be included in the first tier of this hierarchy along with appropriate technical notes (United Nations, 2003, para. 10).

## **VII. Setting the scope of social statistics – beginning of the 2000’s**

36. The United Nations Statistics Division organised an expert group meeting on “Setting the Scope of Social Statistics” in New York from 6 – 9 May 2003 Its task was to set the scope and future direction of social statistics (United Nations, 2002a, para 83). The challenges involved in this exercise and the issues at stake were considerable.

37. The report of the meeting elaborated on several areas of concern identified by the experts, among them:

- The need for a conceptual framework
- The importance of standards and metadata

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<sup>14</sup> These four components are:

1. Indicators relating to the development goals set forth in UN conventions, conferences and declarations;
2. Conference and convention indicators relating to human rights and governance;
3. Basic contextual indicators relating to demographic and economic conditions of a country;
4. Thematic indicators that take into account specific country settings.

<sup>15</sup> “The first tier contains statistical indicators that might be regarded as of the highest priority and are essential for broad monitoring; it includes a small number of indicators in each domain. The second and third tiers contain additional indicators that progressively add to the overall picture and include indicators that allude to additional policy priorities” (United Nations, 2002b, para 11).

- Low political commitment and visibility
- Content of social statistics
- Data sources for social statistics
- Coordination
- Statistical capacity building

38. Each of these areas was focused upon and discussed by experts during the meeting. In the case of a conceptual framework, while the need for one was expressed by some experts, the meeting was not able to reach an agreement on the nature of such a framework. However, the necessity of developing coherent frameworks within specific domains of social statistics was clearly recognized. So were the advantages of a coherent and cohesive approach. An example used as model is presented in the publication by the Australian Statistician Dennis Trewin *Measuring Wellbeing: Frameworks for Australian Social Statistics* (Trewin, 2001).

39. Discussing the appropriateness of international standards in the field of social statistics, experts agreed that setting international standards for social statistics is of primary importance. They concluded that international standards (i.e., concepts, definitions, classifications, methods, guidelines, principles and best practices) not adequate for many areas of social statistics, and that there was an urgent need to evaluate existing standards and to develop them in areas where they are non-existent or deficient.

40. The conclusions and recommendations of the report touched on a number of issues related to international coordination, national coordination mechanisms, raising awareness of the relevance of social statistics to policy, the need for an international partnership for training in social statistics, and the need for a forum for social statistics, to name a few<sup>16</sup>.

41. But first and foremost, the experts requested that the UNSD and partners develop a work programme of activities through 2015 on social statistics, to be carried to the next Statistical Commission. This work programme was developed and presented to the 35<sup>th</sup> session of the United Nations Statistical Commission as the report of the Secretary-General on Social Statistics (programme review). The report was not tabled, and was substituted by an oral presentation on the 2010 World Programme on Population and Housing Censuses. The Commission endorsed the proposal presented orally by the United Nations Statistics Division and distributed in writing as a room document, asking the Commission to regard the proposed activities and priorities stated orally as a replacement for the proposed social statistics forum and the activities related to it that had been laid out in document E/CN.3/2004/2. The Commission then recommended that an international expert group be formed to focus on critical issues related to planning the next round of population and housing censuses; and agreed to consider a resolution in 2005 requesting the Secretary-General to proceed with the development of a 2010 World Population and Housing Census Programme urging States members of the United Nations undertake to carry out population and housing censuses during the period 2005-2014. This development took cognizance of the important role of censuses in the production of social statistics.

42. Consequently, the major vehicle for addressing conceptual and substantial methodological issues pertaining to social statistics was identified as the 2010 World Population and Housing

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<sup>16</sup> The full report is available at:  
[http://unstats.un.org/unsd/demographic/meetings/egm/Socialstat\\_0503/docs/Report.pdf](http://unstats.un.org/unsd/demographic/meetings/egm/Socialstat_0503/docs/Report.pdf)

Programme. One of the major goals of this programme was to set up universal methodological guidelines for quantification of a number of social phenomena, such as education, economic activity, internal and international migration, fertility, mortality, disability and housing conditions.

43. In fulfilling this mandate, the draft *United Nations Principles and Recommendations for Population and Housing Censuses, Revision 2*, was submitted to the United Nations Statistical Commission for consideration and was subsequently approved in March 2006. The major characteristic of this revised set of principles and recommendations is its output orientation, i.e. emphasizing the need to generate relevant and accurate statistics at the level of small areas irrespective of the method used for collecting such data. It lays out the recommended topics for a series of social statistics' such as education, economic activity and so forth, and, in addition, presents a set of recommended tabulations, including the description of metadata as a crucial component in presenting census results. In adopting such an approach, this guideline covers not only the variables that need to be included in statistical data collections, but also the layout of the necessary outputs while not restricting the data collection method to either a census, a survey, registers or other administrative sources. While the Principles and Recommendation do not provide a framework of social statistics *per se*, as it does not cover a number of issues pertinent to monitoring all aspects of the social structure and its phenomena, it provided an initiative of re-thinking the approach to defining social statistics.

44. It has to be emphasized that this current version of the *Principles and Recommendations for Population and Housing Censuses* is just a revised continuation of the basic approach of developing international standards for different areas of demographic and social statistics, preceded not only by previous versions of the recommendations for population and housing censuses, but also by the *United Nations Principles and Recommendations for Vital Statistics System* and *Recommendations on Statistics on International Migration*. It is worth noting that, while a wealth of discussions regarding the scope and content of social statistics took place over the past decades, accompanied by a number of handbooks and manuals, there is an obvious lack of attempting to produce an overall guideline akin to those listed above for the field of social statistics.

45. As part of the preparatory process for the 39<sup>th</sup> session of the United Nations Statistical Commission a Seminar of New Directions in Social Statistics took place in New York, in February 2008. This event being a seminar, the goal was not to put together conclusions and recommendations; rather, it was a solicitation of inputs from distinguished experts regarding the development of social statistics at both national and international levels.

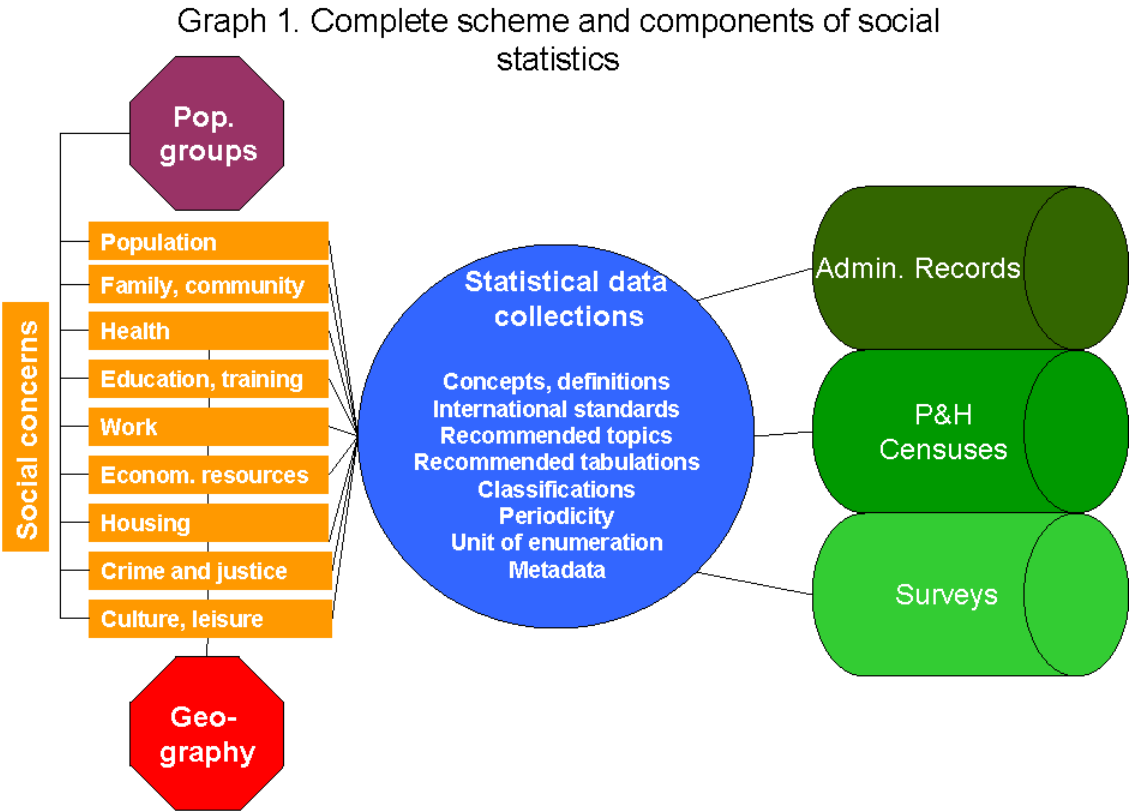
46. This discussion spilled over to the session of the Statistical Commission itself and the Commission noted the intention of the United Nations Statistics Division to take the work on social statistics further and insisted that any proposal to the Commission at its next session on forming a city group in that field should be supported by specific terms of reference.

47. In response, to the above directive, this expert group meeting is called upon to elaborate on the scope and content of social statistics building on all the initiatives, experiences and achievements described in the preceding paragraphs. One of the possible approaches might be striving to focus on social statistics rather than social indicators and to attempt to achieve a tentative design of a framework of social statistics.

48. In essence, such a design would consist of requirements that for each social concern there needs to be an accompanying statistical data collection that requires relevant concepts and definitions, international standards, recommended topics, recommended tabulations, defined periodicity, and sources of data. Collected data would also need to be disaggregated by population groups (young, elderly, and women, to name a few) and by geographical levels.

49. Ultimately, each of the components of social statistics should be clearly and unambiguously described in terms of : (1) a social concern it addresses (e.g. health, housing, learning and education and so forth); (2) sources of statistics (administrative records, population and housing census, household and other surveys); (3) statistical data collection and its components (existence and applicability of international standards in terms of the statistical method, definitions and concepts, recommended topics, recommended tabulations, classifications, periodicity); (4) different population groups (elderly, young, women, men, minorities and so forth); and (5) geographical level of presentation of statistics. This framework, therefore, may be described as clusters of social statistics unified through common methodologies.

50. The scheme below illustrates this concept.



51. Putting together such a framework with the inventory of existing international standards and classifications would allow identifying gaps and to subsequently address them in a consistent and strategic manner. It is too early in the process to assess whether the United Nations Statistical Commission will mandate putting together something akin to *Principles and Recommendations for*

*Social Statistics*, with all the recommended topics, concepts, definitions and tabulations; even if in some other format, such a framework appears to be necessary for further work in this field.

## **VIII. Conclusions**

52. The objective of this paper, as stated in the opening paragraphs, was to enable the expert group to define social statistics by building on past efforts. This paper implicitly raises a number of questions that may assist the expert group in this task.

53. First, how can we best balance the needs of producers and users of social statistics? As seen in the paper, statisticians often strive to achieve a more integrated outlook on social statistics, building upon sound methodological foundations, consistent definitions, classifications, etc. The objective of policy makers, on the other hand, is to obtain statistical information relating to a set of concrete and immediate policy needs. From the discontinuation of the work on the SSDS, to the emergence of indicator lists, this dialectic between statisticians and policy makers has shaped the course of work in social statistics. What actions need to be undertaken to ensure that the two perspectives are reconciled? Is the concept of setting a conceptual framework of social statistics as described earlier a proper and feasible avenue to pursue?

54. Second, what is the expert group's position regarding the integration of social statistics? If it deems that a more crosscutting understanding of social phenomena is required, what steps will have to be taken?

55. Third, what role can the information and knowledge acquired through past experiences play in defining future directions in social statistics? Given the large body of work available, which aspects can the expert group utilize for this task?



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