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SPECIAL ISSUES: FUTURE DIRECTION OF WORK ON  
SOCIAL INDICATORS

Future direction of work on social indicators

Report of the Secretary-General

SUMMARY

The present report has been prepared as a basis for discussion by the Statistical Commission as a special item on the future direction of work on social indicators, pursuant to the conclusions of the Commission at its twenty-second session and of its Working Group at its tenth session. The report reviews some implications for future work of selected major developments and trends in national and international work on social indicators and related statistical issues. Four types of issues are considered: the development of integrated or co-ordinated basic statistics and related methodology (paras. 9-14); the development of automated data bases and dissemination techniques (paras. 15-23); the development and uses of social indicators on special population groups, such as women (paras. 24-40); and the development and uses of social indicators as general measures of development and of well-being (paras. 41-58). In terms of the integration and co-ordination of basic statistics, three lines of work are noted: the development and harmonization of socio-economic classifications, extensive use of household surveys and the integration of social and related economic statistics using the frameworks of the national accounts and balances. In terms of automated data bases and dissemination techniques, the rapid development of new technology with considerable implications for rapid, flexible compilation and dissemination

\* E/CN.3/1985/1.

of social indicators by secondary users inside and outside of statistical services is noted. In terms of uses of social indicators for monitoring and assessment in connection with special issues and population groups, the rapid expansion of interest in that type of application is described and possibilities for meeting that demand through continued methodological and technological improvements are considered.

More detailed information on current national and international work is provided in a separate report submitted to the Statistical Commission at its present session (E/CN.3/1985/11). Points for discussion are given in section VI of the present report (para. 79), and the annex presents, as background and for reference, the conclusions and recommendations of recent technical meetings concerned with social indicators. The comments of the Secretary-General on those recommendations are given in section V (paras. 59-69).

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## INTRODUCTION

1. At its twenty-second session, the Statistical Commission, in its consideration of the draft provisional agenda for its twenty-third session, agreed that one of the three subjects to be included under agenda item 3 (special issues), should be "the future direction of work on social indicators". 1/ The present report has been prepared for the Commission's consideration of that subject.

2. At its twenty-second session, the Commission also agreed that a progress report of the Secretary-General on national and international work on social indicators and on integrated social statistics should be submitted to it at its twenty-third session, pursuant to the Commission's request to the Secretary-General "to continue to keep abreast of national and international work on social indicators and social statistics ...". 2/ That progress report is also currently before the Commission (E/CN.3/1985/11). Previous progress reports on that subject were submitted to the Commission at its twentieth and twenty-second sessions (E/CN.3/517 and E/CN.3/1983/18), following the Commission's approval at its nineteenth session of the publication of preliminary guidelines for social indicators. 3/ The present special issues paper on social indicators and the progress report on social indicators and integrated social statistics (E/CN.3/1985/11) have been prepared so that they are complementary. Ongoing national and international activities concerning certain key issues and subjects which are discussed in the present document are not dealt with in the progress report (E/CN.3/1985/11) to avoid any overlapping. At the same time, the Commission may wish to refer to the progress report for additional information and background for its discussion of social indicators as a special item.

3. When the Commission approved preliminary guidelines on social indicators in 1976, the following principles were emphasized:

(a) The development of indicators should be closely linked to the development of basic statistics;

(b) The work on the framework for the integration of social, demographic and related economic and other statistics should be used as a basis for work on social indicators;

(c) The variations in national circumstances and priorities and the limited progress that had thus far been achieved in the theoretical and practical integration of social statistics precluded the preparation of any single recommended list of social indicators as an international recommendation;

(d) No sound basis existed or appeared feasible at the international level for preparing a single derived index of socio-economic development or welfare comparable to gross domestic product (GDP);

(e) The United Nations Secretariat should take the lead in ensuring the co-ordination of international work on indicators and in facilitating the exchange of national experiences;

/...

(f) United Nations work on social indicators should be seen as a continuation of previous work on the measurement of levels of living, extended to cover socio-economic circumstances and conditions closely related to levels of living.

4. Since 1976, the work on social indicators at national, regional and international levels has demonstrated the continuing usefulness and importance of those principles, all of which may be found in the conclusions and recommendations of the regional and specialized meetings, presented in the annex to the present document. Work on indicators in the United Nations Secretariat has, at all times, been closely linked with the work on the integration of social, demographic and related economic and other statistics. Indicators have been seen as being one approach among several important approaches to integration, and the development of indicators cannot be examined in isolation from the development of social statistics, in general, and from the integration (or systematization) of social and related statistics, in particular.

5. The present report describes a few selected, significant developments and trends in work on social indicators and related statistical issues and their possible implications for the future direction of work. In section I (paras. 9-14), four approaches to the co-ordination of data sources at the national level are described, namely, the harmonization of concepts, classifications and definitions; the use of household surveys; the preparation of special tabulations, analyses and estimates; and socio-economic accounts. At the present time, by far the greatest effort in most countries has been concentrated on household surveys. In many countries significant priority has been given to statistical harmonization and special studies. In the majority of countries, relatively little attention has been given to the development of socio-economic accounts.

6. In section II (paras. 15-23), the potential impact of recent, rapid changes in data processing, data base and communications technologies on social statistics and indicators is briefly discussed. While the significance of that impact has been remarked on, at least since the twentieth session of the Commission, <sup>4/</sup> there has as yet been very little precise information on the full range and specific influence of those changes in the national work on social statistics and indicators. However, it does appear that data base and micro-computer technologies have rapidly been approaching a stage of substantial impact on the ways social indicators are compiled, disseminated and used. In section III (paras. 24-40), one of the most active areas of work on social indicators at the international level at the present time is described, namely, the great interest in the development of statistics and indicators for special population groups, such as women, the elderly, youth and disabled persons. It appears that considerable international work in the future will be concentrated in those fields, in response to user demand and support.

7. In section IV (paras. 41-58), the emergence of a similar interest with respect to other socio-economic concerns, such as health and rural development, as well as a more general monitoring of trends and levels of socio-economic development and well-being, is described. In areas where that work has been most actively pursued, namely, health and rural development, user demands have again played a significant role.

8. A number of points that the Commission may wish to take into account in its discussions are included in the final section of the report (see para. 70 below). The annex presents, as background, the conclusions and recommendations for further work of technical meetings on social indicators and statistics held in 1984 in the African, Asian and Pacific and European regions, and on statistics and indicators on the situation of women and on disabled persons. The comments of the Secretary-General on the recommendations of those meetings are contained in section V.

#### I. CO-ORDINATION OF DATA SOURCES AT THE NATIONAL LEVEL

9. The development and presentation of social indicators has aimed at a limited selection of measures which portray what are deemed to be essential aspects of living conditions, socio-economic development, social conditions, welfare, well-being or some combination thereof. 5/ Increasingly, experience has shown that it is seldom either possible or efficient to use any one source of statistics for those indicators. 6/ Even in the best of circumstances every data source has its limitations, and existing sources are seldom geared to or even consistent with specific requirements of indicators which may be desired. Socio-economic and geographical definitions and classifications differ, coverage may be incomplete, time-reference periods and frequency differ widely, respondents in one type of survey may have inadequate information, and so on. At the same time, in modifying data sources or in developing new sources for indicators, the costs and the factor of timeliness must be taken into account.

10. Various strategies and techniques have been used to try to improve the scope and compatibility of sources and their data outputs for social indicators, namely, (a) the co-ordination of concepts, classifications and definitions, (b) the use of co-ordinated or integrated household surveys, (c) the preparation of compendiums of social statistics and indicators and the increased capabilities for special ad hoc tabulations, analyses and estimates, and (d) "socio-economic accounts" in various forms. Of those approaches, item (c) above has been the first pragmatic response of statistical offices, while item (b) above has most frequently been the more in-depth, longer-term response. A wide variety of compendiums, social reports and sectoral reports (item (c) above) are issued by countries, but only in rare cases are they able to achieve a high degree of integration and consistency among data sources or across a wide range of subject-matter. In many cases, particularly in more specialized studies, continuity has also been a problem. The co-ordination of concepts, definitions and classifications (item (a) above) has been most successful in the context of household surveys.

11. Surveys (item (b) above) have proven to be efficient instruments for collecting a very wide range of socio-economic statistics on the population as a whole and on specific subgroups that may be of special interest. Those have been used to collect data with virtually any periodicity, including longitudinal data, without the high cost and operational difficulties of censuses. The main disadvantages of surveys have been the high cost of increasing sample sizes in order to make possible subnational estimates beyond urban/rural and/or large regions, and difficulties in collecting certain data which require professional or

technical knowledge, for example on health, or detailed information not readily available in the household, for example, certain types of income. Periodic surveys, by their manageable size and frequency, also lend themselves to an incremental development in methodology. Those issues and many uses of household surveys are discussed in detail in the United Nations Handbook of Household Surveys (Revised Edition). 7/

12. Beyond census and survey work, only modest progress has been made in the overall co-ordination of socio-economic concepts, classifications and definitions in most countries. Many developed countries have been able to co-ordinate statistics by geographical locality and age through the nearly total disaggregation in active storage made possible by computers, rather than by the adoption of a hierarchical classification, while in many smaller developing countries, geographical classification has been a relatively simple matter.

13. As a key classification for co-ordinating and comparing socio-economic data, the socio-economic group classification is now receiving considerable attention in many countries and at the international level. Household type is likewise emerging as a fundamental classification for many analytical and policy purposes. Both of those classifications are discussed in the reports excerpted in the annex to the present report and in the progress report of the Secretary-General on the development of social indicators and the integration of social, demographic and related statistics (E/CN.3/1985/11).

14. Various issues and approaches to the integration of social with related economic statistics, using some kind of accounting framework, are discussed in reports prepared by the Secretariat for technical meetings in Europe and Asia. 8/ Those include the treatment in the national accounts of government consumption and expenditure and its functional classification, complexities of transfer payment systems in the social fields, the development of satellite accounts and the concept of total consumption of the population. Much of the national and international work along the lines reviewed in those reports is still relatively experimental and limited to only a few countries. Those reports suggest a number of limited conceptual and practical steps that could be taken to achieve a greater degree of integration and consistency between social and related economic statistics. However, it appears that much more experience will be needed at the national level, particularly in developing countries, before substantial progress can be made at the global level.

## II. DEVELOPMENT OF DATA BASES FOR SOCIAL INDICATORS AND DISSEMINATION OF SOCIAL INDICATORS AT NATIONAL AND INTERNATIONAL LEVELS

15. The list of basic sources of social statistics has not changed significantly in the past two decades, and by and large it has been assumed that those same sources would serve as well for social indicators, with the exception of community-level statistics, which are now receiving more attention. Substantial experience in the use of those traditional sources has accumulated slowly but steadily, covering, for example, population and housing censuses, agricultural



censuses, many different kinds of household surveys, civil registration, other administrative records, and establishment censuses and surveys. There is now a fairly detailed understanding of the advantages, disadvantages and potential of each source. 9/

16. Little of this experience in the analysis of sources for social indicators has been brought together in a systematic, authoritative way, and even if this were to be done, it seems clear that it would confirm that there is no easy way to bring together indicators from disparate and often intractable primary data. That has apparently been a basic discouragement to work on social indicators, confounding initial hope in many quarters that social indicators methods would somehow simplify the development of social statistics. Rather, experience has amply demonstrated that social indicators can help to focus and direct social statistics, and simplification of certain statistical outputs and clarification of underlying concepts are important parts of that process. However, no part of that process is easy and indicators do not offer any shortcuts in basic data collection.

17. With due caution about how much and how quickly statistical organization can or should change, elements of fundamental changes in social statistics work seem to have been appearing. Those elements have included the computerization of basic data, the expansion of household surveys, policy demands for integrated socio-economic monitoring and assessments, and the inexpensiveness and portability of user-oriented data base technology. Naturally, the pace and impact of each of those elements of change has differed widely by country, and those changes, like all statistical development efforts, will require substantial experimentation and investment before they can be successfully implemented. Automated data processing, for example, is still far from routine in many countries and in many fields, and household surveys, while expensive and often ineffective when undertaken piecemeal, are also difficult to meld into an overall, ongoing programme of the desired scope, coverage and frequency.

18. In spite of those and other difficulties, including resource limitations which in many countries are quite severe, the direction of change has been clear and the speed of changes has been relatively rapid. Overall, there has been an increasing trend toward transparency between the statistics and users, and statisticians themselves have been among the users who, with the aid of computers, are becoming much more able to rearrange, select and otherwise work with the basic data, a process which is the essence of social indicators work.

19. Another basic feature of social indicators work has been the need for strengthening links between users and producers of statistics and among producers in different specialized fields. Because of their intended policy relevance and general audience, indicators have emphasized overall trends, often using estimates and projections, simplified presentation, as in graphics, and within-nation and international comparisons. The choice, organization and policy orientation of subject-matter and the selection and specification of indicators thus require substantial communication and elaboration of common concepts and objectives among users and producers. Virtually all social indicators programmes at both the national and international levels have started with assumptions or suppositions

about the desired subject-matter coverage with minimal regard to the usual disciplinary or ministerial lines, or the organization of statistics according to sources. Comparisons, policy-relevant, monitoring and assessment, simplification and crossing of subject and ministerial boundaries have all raised difficult problems for the development of integrated social statistics and indicators.

20. The co-ordination of international compilation and dissemination of social indicators has posed similar, difficult problems. The international statistical services are relatively decentralized, while indicators are multi-source and multi-subject. Each international agency has national statistical contacts in its own sphere of competence, and there is no regular mechanism at the technical level for co-ordinating international requests for data covering various fields. Thus, countries' abilities to respond to requests for indicator series that must be compiled for various fields and from diverse sources are often quite limited, and problems of comparability have been exacerbated when different sources are used by different countries, or even by the same country in responding to different requests. The summary nature of the indicators sought has also led to widely varying interpretations of what exactly was desired in a statistical sense.

21. Intergovernmental discussion has helped in many cases to clarify the kinds of policy-relevant issues indicators should address and, in turn, has stimulated the more precise specification of indicators to meet those needs. The process has been a slow one, as the development of concepts and methods, as well as of data has involved a great deal of dialogue between producers and users of statistics, testing and analysing of concepts and definitions in the field and analysis of their relevance in terms of systematic conceptual frameworks, through several stages of refinement.

22. The work of the Secretariat on the development of statistics concerning women and disabled persons, as noted in the introduction (see paras. 6-7 above), has been largely stimulated by interested users of those statistics. It illustrates how the process of conceptual review and development among users and producers of statistics can lead to a sustained improvement in concepts, methods and applications of social statistics and indicators. That work is described in section III (see paras. 24-25 below), along with an explanation of how the Secretariat is attempting to overcome problems of co-ordination and dissemination through intensive collaboration among users and producers of statistics in those fields and through the application of new technology.

23. The development of concepts and methods is a particularly difficult task even in countries that are well-equipped with statistical resources, and consequently, the international statistical services play a major role. International statistical guidelines and recommendations, as well as technical studies, have played a major role in assisting countries in the selection and application of methodologies, even where international comparability has not been a priority issue. Thus, there is a clear need to achieve a greater degree of consolidation and agreement on basic indicators and their development for national and international purposes, as discussed in the regional reports in the annex to the present report. The Handbook on Social Indicators, which the Secretariat plans to prepare in 1985, in consultation with the specialized agencies, is intended to provide a consolidated reference for national and international use of statistical concepts and methods for indicators.

### III. STATISTICS AND INDICATORS ON SPECIAL POPULATION GROUPS

24. The development of statistics and indicators on population groups that are considered to be of special relevance for policy planning has received high priority in many countries, in regions and at the international level. That interest has provided considerable impetus to a wide range of activities concerned with statistics and indicators on those groups. Those include: (a) critical review and refinement, at national and international levels, of the concepts and methods used in collecting statistics concerning those groups and the preparation of associated documentation, (b) the implementation in countries of new data collection activities, giving special attention to data on those groups, (c) the selection and compilation of statistics and indicators on those groups at the national, regional and international levels. Work is under way at the international level to develop automated data bases usable on micro-computers and (d) training in the collection, compilation and use of those statistics and indicators.

25. The principal groups on which statistical work has been concentrated at the international level have been women (beginning with the World Conference on Women in 1975) and disabled persons (beginning with the International Year of Disabled Persons in 1982). Because there has been a substantial amount of current work in those areas at the national, regional and international levels, with important implications for future work on indicators, current work in those two areas is reviewed below, and some of the lessons and implications to be derived from it are discussed. There has also been an interest in the development of statistics and indicators on youth (in connection with the International Youth Year in 1985) and the elderly (in connection with the World Assembly on Aging in 1982 and the International Plan of Action on Aging), but thus far very little statistical work has been done in those fields in the United Nations system.

#### A. Statistics and indicators on the situation of women

##### 1. International work on concepts and methods

26. The development of statistics and indicators specifically concerned with the situation of women was first recommended at the international level in the World Plan of Action for the Implementation of the Objectives of the International Women's Year, adopted by the World Conference of the International Women's Year in 1975. 10/ That recommendation was followed by Economic and Social Council resolutions 2061 (LXII) of 12 May 1977 and 198/11 of 6 May 1981, and reaffirmed and elaborated in the Programme of Action for the Second Half of the United Nations Decade for Women, adopted by the World Conference of the United Nations Decade for Women: Equality, Development and Peace, in 1980. 11/

27. Further to those recommendations, a joint programme of work on improving statistics and indicators on the situation of women was initiated in 1982 by the International Research and Training Institute for the Advancement of Women (INSTRAW) and the Statistical Office of the Department of International Economic and Social Affairs of the United Nations Secretariat, in co-operation with the

Centre for Social Development and Humanitarian Affairs of the United Nations Secretariat. An Expert Group meeting on that subject was convened by the Secretariat and the Institute in New York from 11 to 14 April 1983.

28. The Expert Group meeting was basically concerned with the detailed review of two technical reports which had been prepared for the United Nations Secretariat by consultants. Those reports were revised to take account of comments made at the meeting, and they are being published. The first report, entitled Compiling Social Indicators on the Situation of Women, was intended as a practical guide for compiling statistics and indicators on the situation of women, using existing national statistical sources and concepts. The second report, entitled Improving Concepts and Methods for Statistics and Indicators on the Situation of Women, is an analysis of conceptual and methodological approaches to improving the quality and relevance of data pertaining to the situation of women. Those reports were designed to be complementary to one another. <sup>12/</sup> The first report focuses on using currently available data and data sources as effectively as possible and the second report focuses on needed longer-term improvements in the concepts and methods used in national statistical systems. The primary audience for the first report is expected to be users of statistics and indicators on the situation of women, who can make use of the document in developing a dialogue with national producers of statistics and to become more informed about the organization, methods and outputs of official statistics. The second report is primarily intended for the producers of national statistics and personnel in national research institutes, both of whom must undertake a variety of research activities, including field trials, if new concepts are to be widely adopted by national statistical services.

29. Each of the reports includes sections on economic activity and labour force participation, income and earnings, literacy, education and training, households and families, and health and health services. The first report also includes sections on legal and political power and rural-urban residence and migration, and the second report includes a section on socio-economic differentiation and mobility. In addition to those two reports, the Expert Group had before it background documents submitted by the Secretariat and by the Food and Agriculture Organization of the United Nations (FAO) and excerpts from the report of the Thirteenth International Conference of Labour Statisticians, convened by the International Labour Organisation (ILO) in October 1982.

30. In addition to suggestions for final revisions of the two documents, which were summarized in the Expert Group's report (ESA/STAT/AC.17/9-INSTRW/AC.1/9), the Expert Group also made a number of recommendations on further work for improving statistics and indicators on the situation of women at the national, regional and global levels, involving training, research, data collection, data analysis and related technical co-operation activities (see the annex to the present document). The implementation of those activities will require concerted and continuing efforts by national users and producers of statistics and appropriate international groups.

31. Some of those activities mentioned in the prededing paragraph are described in a report to the Commission on the Status of Women (A/CONF.116/PC/16). In the area of research, INSTRW and the Statistical Office of the United Nations Secretariat

are considering further methodological and case study research on the measurement and valuation of women's participation in non-monetary productive activities and on the use of household surveys to collect statistics on the situation of women. The Statistical Office is co-operating with the United Nations Development Programme (UNDP) on the development of statistical data for country profiles on women, which are being prepared for an interorganizational evaluation study of technical co-operation as it affects women in Democratic Yemen, Haiti, Indonesia and Rwanda.

32. The Economic Commission for Western Asia (ECWA) has completed a manual entitled "Some indicators for measuring the status of women in the Arab world", which is to be issued in Arabic and English, for the use of statistical officers and project programmers in that region.

## 2. Technical co-operation and training

33. The Secretariat and the United Nations Children's Fund (UNICEF) are promoting technical co-operation in statistics and indicators on the situation of women and mothers, at the national level. About 12 countries have indicated a preliminary interest in undertaking new work in that area, with assistance from technical co-operation. Overall, a large number of census, survey and civil registration projects executed by the Secretariat have provided opportunities for improving statistics on women. Likewise the rapid development of the National Household Survey Capability Programme (NHSCP) has provided additional, important opportunities to improve the availability and use of statistics on the situation of women in countries.

34. Pursuant to the conclusions of the Expert Group on improving statistics and indicators on the situation of women, the Secretariat and INSTRAW have been co-operating on the organization of regional workshops on statistics and indicators on the situation of women. The Economic Commission for Europe (ECE), the Economic Commission for Latin America and the Caribbean (ECLAC) and the Economic Commission for Africa (ECA) plan to convene meetings in 1984/85. The Secretariat is also planning to convene a workshop in Cape Verde in 1985 for Portuguese-speaking countries.

## 3. International compilation and dissemination of selected statistics and indicators on the situation of women using new data bases and micro-computer technology

35. A substantial quantity of data concerning the situation of women is currently being routinely collected in the international statistical services and supplemented, in many cases, with standardized international estimates and projections. However, those have never been systematically compiled in one place, and considerable experience and access to reference services have been required to find and use those statistics effectively. New technologies in data base management and dissemination and the very rapid spread of micro-computers around the world have appeared to make it feasible to compile those data in one source, disseminate them cheaply and quickly on diskettes to users and to prepare

prototype, user-oriented software and documentation for easy reference, analysis, table-generation and similar uses. A special project with those objectives was established in the Secretariat in 1984, with extrabudgetary support, to develop on a micro-computer a user-oriented data base of statistics and indicators on women.

36. That project has included the following activities: (a) the review of available data with international statistical services, in terms of suitability and availability for the data base; (b) the compilation of those data and the provision of software for storing, retrieving and updating them and for preparing special series and tables; (c) a collaboration with major users, namely, the Centre for Social Development and Humanitarian Affairs of the United Nations Secretariat, INSTRAW and other agencies, in the installation of that data base and the preparation of multi-disciplinary regional and international studies for the 1985 World Conference on Women and its follow-up.

37. One immediate use of that data base has been the preparation of a compilation of selected statistics and indicators on the situation of women for the World Conference. The immediate objective of that document is to collect, in one readily accessible and portable reference, basic series and indicators on the situation of women and key projections to the year 2000. Those data, and the accompanying technical notes on sources and concepts, will provide a framework and a point of reference for the preparation of basic analytical documents for the Conference, for substantive discussions at the Conference itself and for organizing follow-up activities in data collection, research and implementation. The provision of carefully prepared series in the compilation will in no way preclude, in fact it is intended to encourage, more intensive, detailed research and analysis in the other Conference documentation and in the follow-up, using the data base.

38. The compilation is being prepared with the following additional considerations in mind:

(a) There should be no new statistical reporting requirements placed on countries;

(b) Series compiled by agencies should be distributed by photocopying, or by other means, to units of the United Nations system concerned with the preparation of substantive studies for the Conference. That will help to ensure the maximum effective use of available data and the consistency of the series cited by various users;

(c) Wherever possible, estimates and projections based on standard concepts and definitions should be used, rather than unadjusted series;

(d) Brief notes on the statistical concepts and definitions used in the series and on the sources and limitation of the data will be included for all series;

(e) Wherever possible, rural and urban data should be distinguished.

B. United Nations Decade of Disabled Persons (1983-1992) and  
World Programme of Action concerning Disabled Persons 13/

39. The Centre for Social Development and Humanitarian Affairs of the United Nations Secretariat is responsible for the Decade and the Programme of Action. The Programme of Action particularly emphasizes the importance of developing statistics on disabled persons using national household surveys. The Statistical Office of the United Nations Secretariat, with the assistance of consultants, has prepared two working papers on the subject of disabled persons, 14/ one focuses on the conceptual and methodological issues involved in collecting reliable and useful data through surveys, and the other examines actual data collected on disabled persons in five countries of the Middle East. An Expert Group was convened at Vienna from 2 to 6 April 1984 to review those papers (see the annex to the present document).

40. The work of the Secretariat in the development of statistics on disabled persons has included (a) the review of statistical concepts and methods for use in surveys and censuses, (b) technical co-operation and (c) experimentation with methods and procedures for user-oriented data bases for statistics and indicators on disabled persons at the national level. From information obtained thus far, it appears that a large number of developing and developed countries have collected or are planning to collect statistics on disabled persons in censuses and surveys. The Secretariat work aims at promoting that activity through training, technical co-operation, research and an exchange of experience on methods and applications and illustrations of the results achieved. In addition, further work in the Secretariat will be concerned with the development of statistics and indicators for monitoring and evaluating the implementation of the World Programme of Action concerning Disabled Persons, pursuant to the recommendations of that Programme (A/37/351/Add.1 and Add.1/Corr.1, annex, paras. 194, 195 and 198).

IV. MONITORING TRENDS AND LEVELS OF SOCIO-ECONOMIC  
DEVELOPMENT AND WELL-BEING

41. The monitoring of trends and levels of socio-economic development and well-being may be considered from three different perspectives: from the aggregate national level, viewed from the national or international point of view; from the subnational level, such as the community level or other geographical disaggregation; and from the project or programme-oriented monitoring and evaluation perspective within countries.

42. In terms of the aggregate national perspective, many Governments and intergovernmental bodies have given extremely high priority to the selection and compilation of indicators on levels of living and related socio-economic conditions. In developing countries, this work has proceeded by establishing general objectives or goals of socio-economic development and ensuring that participation in and benefits received from this development are widely distributed. In integrated socio-economic development, economic and social policies and objectives cannot be considered separately. In fact, it is argued that for development to proceed effectively, wide participation in it and in the

distribution of benefits are not only desirable objectives but prerequisites. Otherwise development will either falter or be so highly inequitable as to be undesirable. Thus, extensive programmes for monitoring various aspects of trends and levels of socio-economic development and well-being using indicators have been developed by FAO, in connection with the Programme of Action for Agrarian Reform and Rural Development, adopted in 1979, 15/ and by the World Health Organization (WHO), in connection with its programme Health for All by the Year 2000. 16/ Those programmes are described in sections A (paras. 45-51) and B (paras. 52-56) below. Other international activities along those lines and some general conclusions are noted in section C (see paras. 57-58 below).

43. From the point of view of subnational data, national experiences and priorities differ widely, but in nearly all countries it appears that some significant work has been done on regional (within-country) indicators and comparisons, in connection with the distribution of national government resources. However, no systematic international work on that application of indicators has been undertaken. Work on local-level (community) statistics was described in the progress report of the Secretary-General on national and international work on social indicators and on related concepts and classifications for general use (E/CN.3/1983/18, para. 28).

44. Another area in which there has been considerable national and international interest is the potential use of social indicators and statistics in the programme of project planning, monitoring and evaluation. For example, internationally supported projects often entail substantial expenditures for the compilation and analysis of data in impact areas at planning, implementation and evaluation stages. The extent to which data and indicators from the national statistical services are or could be used has not been systematically assessed nor has the methodology been analysed from the point of view of linking that activity to ongoing national statistical development. Some of those methodological difficulties were noted in the preliminary guidelines on social indicators. 17/ However, given the considerable demand for and investment currently being made in statistics for planning and evaluation, there may be scope for examining the potential role of indicators in promoting consistency and eliminating duplication between statistical services and project and programme evaluation activities.

A. Programme of Action for Agrarian Reform and Rural Development  
(adopted in 1979)

45. As part of the implementation of the Programme of Action of the World Conference on Agrarian Reform and Rural Development (WCARRD), a socio-economic indicators programme for monitoring and evaluating agrarian reform and rural development at the national level has been developed by FAO. The objectives of that programme are to assist countries in developing national programmes of socio-economic indicators for formulating, implementing and evaluating rural development programmes, and to help them in establishing benchmarks and targets for reporting changes in those indicators at every other biennial FAO Conference, starting in 1983.



46. The first step in that programme consisted of the preparation in 1980 of a draft list of socio-economic indicators and the circulation of that list for comments to countries, the United Nations specialized agencies and other concerned international organizations. The second step comprised the testing of those indicators in 24 country pilot studies conducted from 1981 to 1983. Those countries included: Bangladesh, Barbados, Cameroon, Cape Verde, Colombia, Costa Rica, Egypt, Indonesia, Jordan, Kenya, Malaysia, Nepal, Philippines, Republic of Korea, Sierra Leone, Sri Lanka, Suriname, Syrian Arab Republic, Thailand, Togo, Tunisia, Venezuela, Yemen Arab Republic and Zambia. 18/ The third step consisted of conducting four regional expert consultations, one in each developing region, in 1982. The results of completed pilot studies were discussed in those consultations and recommendations were formulated on the implementation of the programme in those countries. 19/ The preparation of provisional guidelines on some recommended indicators and on a common format for use by countries in reporting to the 1983 FAO Conference was also facilitated by those discussions. 20/

47. Following up on those activities, work is in progress on the preparation of more detailed guidelines, to be followed by extensive promotional and technical co-operation activities with those countries. Concurrently, a computerized data bank has been set up at FAO headquarters containing data and information on agrarian reform and rural development. The data bank has provided useful inputs to the "Progress Report on WCARRD Programme of Action", prepared for the 1983 FAO Conference (C 83/23). It is planned to develop and update that information system to serve subsequent stages of monitoring and evaluation.

48. At the present stage, four countries are conducting the second round of pilot studies on socio-economic indicators. Those countries are Benin, Bolivia, Lesotho and Peru. Proposals are being received for similar studies in several other countries, including China, Fiji, Malawi, Viet Nam and Zimbabwe. It is also planned to conduct a regional expert consultation, possibly in Asia and the South-East Pacific subregion. The use of socio-economic indicators and the statistical programmes needed for generating the required basic data were the major subjects at an FAO-sponsored National Demonstration Centre in Sri Lanka in November 1983.

49. Following the recommendations of the Informal Consultations on Guidelines for Developing a National Programme of Monitoring and Evaluating Agrarian Reform and Rural Development Using Socio-Economic Indicators, held in December 1982, 21/ detailed guidelines are being prepared, with the help of consultants, to be completed in 1984. The guidelines will cover the conceptual framework on agrarian reform and rural development, socio-economic indicators, techniques of analysis and methods of statistical development. They will be circulated to agency members of the Panel on Monitoring and Evaluation of the Administrative Committee on Co-ordination Task Force on Rural Development for comments before they are published.

50. Status reports on the development and implementation of the socio-economic indicators programme in various regions have been prepared for discussion at regional inter-agency and intergovernmental consultations on WCARRD follow-up held in 1983. Those reports are based on the country pilot studies, the in-depth studies on poverty and the country progress reports on WCARRD follow-up.

51. In addition to the reports and publications already mentioned, the following have been prepared or are planned: the statistical series of socio-economic indicators; an analytical report on agrarian reform and rural development; a revision of the FAO report on socio-economic indicators readily available from international data bases; and a provisional regional "yearbook" type publication on socio-economic indicators. Future activities will comprise the promotion and adaptation of the guidelines on socio-economic indicators to particular regions and the preparation of studies and methodological publications covering various areas of the programme, such as people's participation, concepts and methodology for establishing poverty lines, criteria for determining socio-economic groups and the use of indicators for development analysis and planning. Promotional work in countries will be supported by the review and exchange of information on national practices on socio-economic indicators, the formulation of technical advisory and assistance activities and the conduct of national workshops or expert consultations.

#### B. Health for All by the Year 2000

52. The adoption in 1981 of the Global Strategy for Health for All by the Year 2000, by the World Health Assembly, marked a radical change in the orientation of health development. The Strategy was aimed at attaining the goal for all people in the world to lead a socially and economically productive life, by redirecting national health systems based on the primary health care approach. Following up that collective decision, countries have engaged themselves in developing new policies, strategies and plans in order to strengthen their managerial capacities, including the necessary information support.

53. The Global Strategy contains a list of indicators which the Health Assembly approved for use in the global monitoring and evaluation of the Strategy. 22/ As health development defined in the Strategy is multisectoral, a few relevant socio-economic indicators that are usually generated in sectors outside the jurisdiction of the ministries of health were included among the indicators selected. Some of the WHO regional committees have also adopted additional indicators for use in regional monitoring and evaluation, besides the global indicators. The governing bodies of WHO have also encouraged countries to develop and use national indicators suited to their specific situations and needs. In order to help in that national task, a technical report on the development of indicators was issued by WHO. 23/

54. A plan of action adopted by the World Health Assembly in 1982 for implementing the Global Strategy for Health for All by the Year 2000 included a timetable for monitoring at two-year intervals and evaluating at six-year intervals. The indicators selected for global monitoring and evaluation comprised general social and economic indicators and indicators on health policy, provision of health care and health status. In 1983, countries presented their first progress reports monitoring the implementation of their strategies. Those reports were consolidated into regional reports and reviewed by the respective regional committees of WHO in 1983. A global progress report was prepared on that basis for review by the Executive Board of WHO and by the World Health Assembly in 1984. The regional and global reports contained analyses of the values of the global indicators reported upon by countries.

55. Those first progress reports clearly revealed the weaknesses in national mechanisms for generating and using information and indicated the urgent need for strengthening national capacities in that regard. The information exchange between sectors within countries has been found to be especially insufficient. To help in the evaluation reporting due from countries in 1985, the WHO secretariat has initiated intensive dialogues with countries. Data available on the global indicators, including those made available by the other organizations of the United Nations system, will be presented to those countries concerned, for verification and updating, and for stimulating countries' actions to strengthen their capacities for using relevant information for health development.

56. The global progress reports that are being reviewed by the governing bodies of WHO in 1984 will not be published. However, the results of the 1985 evaluation reporting will be published in 1986, in the six official languages of WHO, in a document entitled "Evaluation of the Strategy for Health for All by the Year 2000 - seventh report on the world health situation".

#### C. Other development strategies and events and general conclusions

57. The interest in indicators in connection with international strategies and events was summarized in the progress report of the Secretary-General on national and international work on social indicators and on integrated social statistics (E/CN.3/1985/11, para. 18). Overall, at the international level, the integrated approach to indicators set out in the United Nations preliminary guidelines was followed most successfully in the work on statistics and indicators on women and on disabled persons, as discussed earlier (see paras. 26-40), where intended users have played major roles in stimulating interest, critically analysing concepts and methods and mobilizing resources for statistical work at the national, regional and international levels. Work in connection with Health for All by the Year 2000 and Agrarian Reform and Rural Development has followed somewhat different approaches. Those have been linked directly to monitoring specific policy objectives, as established by the competent intergovernmental bodies in each case. The direct translation of those statements of policy objectives into practical statistical requirements has been a difficult process, and the implementation of them in statistical work has been even more problematic, at least up to the present time, as evidenced by the limited use of statistics in the international monitoring reports prepared thus far.

58. Similar problems have been even more manifest in connection with the development and use of indicators for monitoring the International Development Strategy for the Third United Nations Development Decade and for implementing the Declaration on Social Progress and Development (discussed in the progress report of the Secretary-General (E/CN.3/1985/11, paras. 19-20)). In those cases, the stated policy objectives were even more general, and no consideration has been given to the development of statistics for monitoring. Thus, statistical work on indicators for those purposes has been quite limited thus far.

V. COMMENTS OF THE SECRETARY-GENERAL ON THE RECOMMENDATIONS OF UNITED NATIONS TECHNICAL MEETINGS ON FUTURE WORK ON SOCIAL STATISTICS AND INDICATORS\*

A. Expert Group on Improving Statistics and Indicators on the Situation of Women

59. The Secretary-General fully supports the priority given by the Expert Group to assisting Governments in meeting women's needs at the national level and to promoting communication and interaction between users and producers of statistics and indicators on the situation of women. The United Nations Secretariat will continue to collaborate with other units of the United Nations system, including INSTRAW and the regional commissions, to further those objectives.

60. Within the scope of the Expert Group's recommendations, there is currently collaboration in organizing regional and subregional workshops and seminars on statistics and indicators on the situation of women. Plans have been completed for meetings in Africa, Europe and Latin America and are under discussion for Asia and the Pacific. Those meetings will, as recommended, include both users and producers of statistics and will, inter alia, consider conceptual and methodological issues which need further study and promote the use of existing data in countries.

61. Promotion and dissemination of methodological experience and information concerning statistics and indicators on the situation of women are and will continue to be actively pursued by the Secretariat and INSTRAW, in collaboration with other units of the United Nations system, on an ad hoc basis, within the limits of available resources.

62. The Secretariat and INSTRAW have undertaken or plan further research on the following topics concerning statistics on women, subject to the continuing availability of appropriate resources: income and income distribution, non-monetary income and consumption and time allocation.

63. The Secretary-General fully supports the recommendations of the Expert Group concerning technical co-operation. Every effort is being made to identify and assist countries in improving their statistics and indicators on women through technical co-operation, in particular through the National Household Survey Capability Programme, as an integral part of national statistical development.

B. Expert Consultation on a System of Socio-Economic Indicators for African Planners

64. The Secretary-General recognizes and fully supports the need expressed by the Expert Consultation for development indicators appropriate to the conditions of African countries and which reflect the specific concerns of African development plans, in particular those described in the Lagos Plan of Action for the

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\* The recommendations are excerpted in the annex to the present report.

Implementation of the Monrovia Strategy for the Economic Development of Africa. As the Expert Consultation recommends, those indicators should cover a range of development concerns in addition to levels of living and should be established within the framework of United Nations work on social indicators and improvement of basic statistics at the national level. The Secretary-General considers the Expert Consultation's conclusions concerning the urgent importance of improving statistics generally in Africa as particularly significant.

65. The Department of International Economic and Social Affairs of the United Nations Secretariat will continue its close collaboration with the Economic Commission for Africa to further those objectives.

C. Conference of European Statisticians Working Party on the Framework for the Integration of Social and Demographic Statistics (eighth session)

66. The Secretary-General fully supports the recommendations of this meeting, and the Statistical Office of the United Nations Secretariat will continue to collaborate with the secretariat of the Economic Commission for Europe in the planned activities.

D. Expert Group on Development of Statistics on Disabled Persons

67. The Secretary-General fully supports the recommendations of the Expert Group concerning development of data base methodology, collection and dissemination of statistics on disabled persons, particularly in connection with monitoring and evaluation of the World Plan of Action concerning Disabled Persons, and promotion of technical co-operation in this field. The Secretariat has undertaken limited work on each of those activities, and they will be pursued and expanded to the extent that resources can be made available.

E. ESCAP Seminar on Social and Related Statistics

68. The Secretary-General welcomes the conclusions of the seminar in the priority field of social statistics and indicators and in particular supports those conclusions concerning co-operation between users and producers of statistics, the importance of statistics on special population groups, the need for continuing methodological development of methods of integration and socio-economic classification, the application of new technology, the need for continuing efforts to improve statistical training and encouragement of technical co-operation in statistics and support of the National Household Survey Capability Programme.

69. The Statistical Office of the United Nations Secretariat will continue to collaborate with the Statistics Division of the Economic and Social Commission for Asia and the Pacific (ESCAP) in statistical activities with those objectives, within the limits of resources that can be made available.

## VI. POINTS FOR DISCUSSION

70. The Commission may wish to discuss priorities and activities for future work on social indicators along the following lines:

(a) What types of concepts, classifications and definitions are most significant for social indicators? To what extent is new or continuing work needed for their harmonization at the national, regional and international levels? How, and to what extent, can international technical studies contribute to national work in those areas?

(b) What is the relative importance of the various sources of basic data for indicators? Which sources could most benefit from new work at the national and international levels? In what ways should the development and compilation of indicators be included in the explicit objectives of basic data collection programmes?

(c) How could the links between social and economic statistics, in particular with the national accounts and balances, be strengthened? What international work on that topic would be most useful to countries?

(d) Will the rapid adoption of new computer technologies increase or decrease the demand for data producers to prepare indicators?

(e) What should be the primary objectives of the planned United Nations Handbook of Social Indicators? Should it be aimed at both producers and users of statistics and indicators? To what extent should it provide guidance for both the national and international levels? Should co-ordination issues be addressed? Should the basic principles on indicators set out in the United Nations preliminary guidelines on indicators be modified or updated?

(f) Should technical training specifically concerned with indicators be developed?

(g) To what extent could indicators' concepts, methods and compilation contribute to programme and project evaluation in countries? Should improved methods for that purpose be developed?

(h) Should national statistical offices seek a greater role in the national co-ordination of indicators for national and international purposes?

(i) What mechanisms could be used to implement co-ordination at the international level and to promote the exchange of national experience among countries?

(j) How could the co-ordination of statistical concepts, classifications and methods across different organizational boundaries at both the national and international levels be improved?

(k) How could the international co-ordination of indicators compilation and dissemination be improved? What should be the respective roles of the Statistical Commission, the various international statistical services (including the regional commissions) and international users in co-ordinating, compiling and disseminating social indicators?

#### Notes

1/ Official Records of the Economic and Social Council, 1983, Supplement No. 2 (E/1983/12), para. 131.

2/ Ibid. para. 81 (c).

3/ Social Indicators: Preliminary Guidelines and Illustrative Series (United Nations publication, Sales No. E.78.XVII.8).

4/ At its twentieth session, the Commission considered a report of the Secretary-General on the integration of social and related statistics (E/CN.3/516). In that document, changing data needs and statistical technology: the changing nature of statistical activity was presented (in sect. II.A).

5/ Various national concepts of social indicators have been discussed in the report on social indicators submitted to the Statistical Commission at its twentieth session (E/CN.3/517, paras. 7-9), and in a Secretariat working paper issued in 1981 (ST/ESA/STAT/102, paras. 7-10). Social Indicators: Preliminary Guidelines and Illustrative Series, op. cit., "emphasize the development of social indicators as a user-oriented selection process, directed towards the measurement of living conditions and of the circumstances and factors that influence these conditions" (preface).

6/ Basic data sources for indicators compendiums were reviewed in a Secretariat working paper (ST/ESA/STAT/102, paras. 11-16), and in the progress report on indicators submitted to the Commission at its twenty-second session (E/CN.3/1983/18, paras. 8-10).

7/ United Nations publication, Sales No. E.83.XVII.13.

8/ "The integration of economic and social statistics - general issues" (CES/WP.34/52), "The integration of economic and social statistics - health and health services, education, and housing and its environment" (CES/WP.34/52/Add.1) and "Development of integrated social and economic statistics" (STAT/SSR/4).

9/ Those matters are discussed in Principles and Recommendations for Population and Housing Censuses, Statistical Papers, Series M, No. 67 (United Nations publication, Sales No. E.80.XVII.8), sect. I. C, the Handbook of Household Surveys (Revised Edition) (United Nations publication, Sales No. 83.XVII.13), chap. I, and "Use of population and housing censuses as single-source, multi-subject data bases; preliminary results of an inquiry to selected countries" (CES/WP.34/36).

Notes (continued)

10/ See Report of the World Conference of the International Women's Year, Mexico City, 19 June-2 July 1975 (United Nations publication, Sales No. E.76.IV.1), chap. II, sect. A, paras. 161-173.

11/ See Report of the World Conference of the United Nations Decade for Women: Equality, Development and Peace, Copenhagen, 14 to 30 July 1980 (United Nations publication, Sales No. E.80.IV.3 and corrigendum), chap. I, sect. A, paras. 257-261.

12/ United Nations publications, Sales Nos. E.84.XVII.2 and E.84.XVII.3.

13/ Adopted by the General Assembly at its thirty-seventh session (resolution 37/52 of 3 December 1982).

14/ "Use of household surveys to collect statistics of disabled persons" (ESA/STAT/AC.18/3) and "Development of statistics of disabled persons: case studies of Egypt, Iraq, Jordan, Lebanon and Syria" (ESA/STAT/AC.18/4).

15/ See Food and Agriculture Organization of the United Nations, Report of the World Conference on Agrarian Reform and Rural Development, Rome, 12-20 July 1979 (WCARRD/REP), part one; transmitted to the members of the General Assembly by a note by the Secretary-General (A/34/485).

16/ See World Health Assembly resolution WHA 34.36 of 22 May 1981.

17/ United Nations publication, Sales No. E.78.XVII.8, paras. 2.9-2.11.

18/ Regional Summaries of Country Pilot Studies on Socio-Economic Indicators (Rome, FAO, 1983).

19/ "Consolidated report of the expert consultations on socio-economic indicators for monitoring and evaluation of agrarian reform and rural development for Asia and the South-West Pacific, Africa, Latin America and the Near East" (ESS/Misc/82-3).

20/ Provisional Guidelines on Some Recommended Indicators for National Monitoring Purposes and Reporting to 1983 FAO Conference on Progress in Agrarian Reform and Rural Development (Rome, FAO, 1982).

21/ The report of that meeting has been issued by the Statistics Division of FAO.

22/ These are contained in "Common framework and format for monitoring progress in implementing the strategies for Health for All by the Year 2000" (DGO/82.1).

23/ Development of Indicators for Monitoring Progress towards Health for All by the Year 2000 (Geneva, WHO, 1981).



Annex

EXCERPTS FROM CONCLUSIONS AND RECOMMENDATIONS OF SELECTED INTERNATIONAL  
TECHNICAL MEETINGS ON FUTURE WORK ON SOCIAL STATISTICS AND INDICATORS\*

I. EXPERT GROUP ON IMPROVING STATISTICS AND INDICATORS  
ON THE SITUATION OF WOMEN\*\*

1. In examining future priorities, first consideration should be given to women's needs at the national level. Data analysis should be linked to the establishment of priorities that can be identified through national workshops, bringing together women's groups, planners, statisticians and researchers. The Expert Group suggested the following areas and activities for follow-up action:

(a) The interaction between national and international specialists and between users and producers of statistics at the meeting had been very fruitful, and possibilities of bringing such a range of specialists together on a regular, if informal, basis should be considered. Among other subjects, such meetings could suggest issues concerning statistics on women, to be considered in revision of the United Nations System of National Accounts, the International Standard Classification of Occupations, and preparations for the 1990 round of population and housing censuses;

(b) Other institutional mechanisms to promote the exchange of experience on important methodological problems, such as a clearing-house, and promotion of the networking concept to secure interaction and reach national machineries should also be considered;

(c) The following priority areas for further research where it is necessary to develop new methodology to be used in household surveys and/or censuses were discussed without assigning priority among them:

- (i) Intrahousehold patterns and inequalities, focusing on intrahousehold income distribution and control issues;
- (ii) Women's participation in the agricultural labour force in regions where there is cultural resistance in reporting such participation;
- (iii) The informal sector;
- (iv) Time allocation;

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\* Listed in chronological order according to the date of each meeting.

\*\* Excerpted from the report of the Expert Group (ESA/STAT/AC.17/9, paras. 77-86), which met in New York from 11 to 15 April 1983. That meeting was convened by the Statistical Office of the United Nations Secretariat, in co-operation with INSTRAW.

- (v) In-depth study and the development of concepts and appropriate measures in the areas of non-monetary income and consumption and housework and their valuation;

- (vi) Training outside the regular education system.

Research case studies in the above areas should emphasize the testing of alternative methodologies and concepts at the micro-level and lead to the refinement of needed methodologies. The need for researchers to summarize and report on their methodological experiences in those areas and for pilot studies for testing concepts and measures was noted;

- (d) National and regional workshops to train users and producers of data in analysing data on sex differentials concerning key areas should be organized;

- (e) A mechanism for providing information to researchers at the national level on the state of the art concerning various methodological issues should be sought, such as the preparation and distribution of specialized pamphlets concerning issues in the fields of labour force, health, education and so on;

- (f) Documentation for training was needed, together with a mechanism for the training of statisticians;

- (g) Exploitation of existing data archives should be pursued and possibilities of new tabulations of existing data explored.

2. The Expert Group noted the central role of the Statistical Commission, the Statistical Office of the United Nations Secretariat, the regional conferences of national heads of statistics and INSTRAW in promoting the improvement of statistics and statistical methods concerning the situation of women, and expressed the hope that the subject could be included in their programmes of work. The National Household Survey Capability Programme in particular was now becoming operational, and early action was needed to ensure its attention to issues concerning women. The Expert Group also noted the importance of statistics and indicators on the situation of women in other areas of national and regional work, including major conferences on health, education and the like, and expressed the hope that statistics and indicators could also be introduced in this work.

3. Many participants stressed the crucial need for direct technical assistance to national statistical offices in compiling statistics and indicators on the situation of women and in improving their basic concepts and methods. Such assistance could take the form of advisory services, practical handbooks, guidelines and methodological recommendations, particularly concerned with analysis, and support of special compilation and tabulations.

4. There was also a continuing need to convince policy-makers of the importance of the role of women in development, for which good statistics were needed, and to convince decision-makers of the priority that should be accorded to this field by pointing out the policy and programme implications of statistics on women in development. Case studies undertaken along those lines should be documented and disseminated.

5. The importance of further research on concepts of households and families and the creation of household and family typologies was also emphasized. Such research should try to go beyond simplified standardized concepts, to identify and describe underlying socio-economic patterns and their impact and significance.

6. The Expert Group also noted that considerable methodological research on issues raised in the meeting had been carried out in a number of countries, and several participants indicated the willingness of their countries to share the results. Very often extensive experimentation had resulted in small but crucial changes in data collection instruments. At the same time, the Expert Group agreed that changes in large-scale collection programmes such as censuses and national surveys could have a major impact and should not be undertaken lightly without careful and thorough preparation and testing. However, collection of data in a form that misrepresented the situation of women should not be justified solely on the grounds of maintaining comparability of historical time-series. A building block approach to categorization would often allow a range of purposes to be served and permit comparability with earlier series to be combined with new approaches.

7. The operational activities of NHSCP and ways in which issues concerning statistics and indicators on women could be incorporated in the operational work of ongoing country survey programmes through training, technical advisory services and survey design were described. The Expert Group noted that survey content and priorities in each country were set by participating countries but it emphasized the interest and willingness of NHSCP to respond to any interests expressed by countries in incorporating women's issues in their programmes.

8. In concluding its discussion of further work, the Expert Group noted that it had made a number of specific suggestions for research, including methodological development, training and data collection and compilation, which could be incorporated in proposals to potential donors and discussed with officials and researchers in developing countries interested in developing their programmes and capabilities in this field. Such activities should be integrated as closely as possible with national statistical development programmes and with users in all fields. The Expert Group strongly emphasized the need for mobilizing new resources for technical co-operation activities at the national, regional and international levels if there was to be significant progress in achieving the objectives of the United Nations Decade for Women. It suggested that multilateral sources, such as UNDP, the United Nations Fund for Population Activities (UNFPA) and UNICEF, as well as bilateral and non-governmental sources, should be approached for support. Finally, the Expert Group urged that potential donors consider such requests sympathetically in view of the importance of the issues considered at the meeting.

II. EXPERT CONSULTATION ON A SYSTEM OF SOCIO-ECONOMIC  
INDICATORS FOR AFRICAN PLANNERS\*

Recommendations and conclusions

9. There is an urgently felt need by most countries of the region for development indicators that are appropriate to the conditions of African countries, on the one hand, and that reflect the specific concerns of African development planning, on the other hand.

10. Those indicators should be designed within the framework provided by the concept and strategy of development expressed in the Lagos Plan of Action, which emphasize: (a) the satisfaction of basic needs; (b) national autonomy, self-reliance and independence; (c) collective self-reliance among African countries; (d) popular participation in development; (e) structural transformation conducive to self-sustaining development; (f) preservation of cultural heritage and reaffirmation of cultural identity; and (g) protection of the environment.

11. The indicators should not be simple "social indicators" for the description and monitoring of levels of living or social well-being, but should be "development indicators" which attempt to capture the essential components of development and which reflect the factors of the development process.

12. Development planning is a multi-level and multi-sectoral process, with the consequence that indicators may be developed for various levels of planning and for various sectors of the national economy, and subsystems of indicators and sector-oriented indicators have their legitimate place in the planning process. But the most urgent task now is to develop overall development indicators for use at the national or subnational level of planning and decision-making.

13. Basic statistics are essential for the compilation of meaningful development indicators, and since existing statistics in most African countries are still inadequate in many respects, it may not be immediately practicable to measure all of the indicators that may be deemed desirable. However, data shortages may not be as serious as commonly believed in view of the existence of a large body of underutilized and often unpublished data which are potentially useful. On the other hand, African countries would be ill-advised to restrict the scope of development indicators to the range of data actually available at present, since ongoing development of basic statistical data should be planned to take into account indicators requirements. Restricting the scope of indicators to currently available data may prevent the full reflection of the concerns of African countries, which were expounded in the Lagos Plan of Action.

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\* Excerpted from the report of the Expert Consultation (E/ECA/PSD.3/12, E/ECA/SERPD/INDIC/12/Rev.1, paras. 65-79), which met at Addis Ababa from 23 to 27 January 1984. That meeting was convened by the Socio-Economic Research and Planning Division of the Economic Commission for Africa.

14. The demand for new data may not be as large as it appears at first sight, and African countries may follow a carefully designed step-wise programming approach to the adaptation of existing data and to the collection of additional information in order not to overtax their capacities for the collection and processing of statistics. It should nevertheless be understood that the additional statistical burdens that may result from the adoption of a relevant set of development indicators are part of the unavoidable price of the urgent task of going beyond conventional concepts of development and of transcending traditional approaches to the collection and processing of information.

15. It is highly unlikely that a single set of development indicators can be acceptable to all countries in the region and generally applicable in all countries. Each individual country must, in the final analysis, decide for itself the composition of the set of indicators that suits its conditions and priorities. Bearing these considerations in mind, the meeting proposed that the following set of indicators be considered as a framework for the development and utilization of development indicators in African countries. The structure of the set is as follows:

I. Basic needs

- A. Health, food and nutrition
- B. Education
- C. Housing and human settlements
- D. Social services

II. Employment, household expenditure, income and assets

- A. Labour force participation
- B. Household incomes and assets

III. Economic activity

- A. Institutional structure of production
- B. Macro-economic structure
- C. Economic growth
- D. Economic stability
- E. Investment
- F. Productivity and elimination of wastage

IV. Participation in development

- A. Popular participation in social and development activities
- B. Social cohesion and integration
- C. Social stratification and mobility
- D. Social stability

V. National autonomy

- A. Food security
- B. Endogenous technology
- C. Cultural development
- D. Economic and financial independence

VI. Collective self-reliance

VII. Demographic structure and trends

VIII. Environment and land use

IX. Information improvement

X. Special national concerns

16. Basic data sources for indicators include the population, housing, agricultural, industrial and commercial censuses; household surveys covering, among other key subjects, employment and economic activity, income assets and expenditure, small-scale enterprises and farming, demography, health and nutrition, education and culture and popular participation; industrial and commercial surveys; civil registration; and administrative records and special studies in such areas as land use, education, health, social insurance, public safety and taxes. Each country should prepare a priority list of socio-economic indicators for development, drawing on regional and international recommendations and guidelines and make every effort to ensure the priority development of the basic data sources to implement that list. Compilation and use of socio-economic indicators at the national level on a regular basis will: (a) enable each country to monitor and assess its development performance within an integrated planning framework and consider appropriate policy action; (b) point to significant data gaps and needs; (c) facilitate co-ordinated reporting to international agencies of progress achieved in respect of internationally adopted goals, objectives and strategies. To ensure that women's concerns are fully taken into account, sex breakdowns should be provided as far as possible for the indicators.

17. Improvement of concepts and methods for socio-economic indicators of development must also be given high priority at the national, regional and international levels, in order to take account of socio-economic circumstances and objectives in the African countries. Such improvements should be sought through the joint review by users and producers of statistics and indicators of indicator's requirements for policy purposes in each field of statistics and indicators. Priority should be given to the review of concepts and methods, taking circumstances in the African countries into account, in the system of national accounts and in the fields of labour force and economic activity, income, consumption and accumulation of households, health and nutrition, small-scale household enterprises and agricultural activities, popular participation and the situation of women.

18. In order to avoid overtaxing the capabilities of national administrations and to ensure co-ordination and comparability, it would be crucial that the various international agencies co-operate fully in the development of indicators for African countries. In particular, ways and procedures should be established to ensure that work carried out at the regional level is closely co-ordinated with the overall United Nations programme and with the programmes of the various specialized agencies. One important way to do this would be to establish specific projects for which resources could be pooled.

III. CONFERENCE OF EUROPEAN STATISTICIANS WORKING PARTY ON THE  
FRAMEWORK FOR THE INTEGRATION OF SOCIAL AND DEMOGRAPHIC  
STATISTICS (EIGHTH SESSION)\*

Future work

19. As a result of its discussion of this item, the Working Party agreed to recommend to the Conference the following programme of work.

Framework for the integration of social and  
demographic statistics

Description: Participation in the work of the Statistical Commission on the elaboration of a framework for the integration of social and demographic statistics; elaboration of the common concepts, definitions and classifications of the framework, and links among the different fields of social and demographic statistics and with the systems of national accounts and balances; participation in the work of the Statistical Commission on social indicators; and work on related subjects.

Work to be undertaken:

(a) Preparatory work for and informal meeting (1984/85) on socio-economic group classification to consider the development of a sound socio-economic classification scheme for assigning socio-economic positions to households and to individuals, and capable of being used with data from censuses, household surveys and other sources;

(b) Preparatory work for and ninth session of the Working Party (1986/87) to consider (i) the development and harmonization of concepts, definitions and classifications in specific fields of social and demographic statistics, and assessments of their possible use in household surveys (based on reports from ad hoc meetings); (ii) links among economic, social and demographic statistics (including the development of economic accounts in social fields, satellite accounts, social accounting matrices, total consumption of the population etc.)

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\* Excerpted from the report of the Working Party (CES/WP.34/56 para. 74), which met at Geneva from 30 January to 3 February 1984.

(by the Statistical Office of the United Nations Secretariat and national rapporteurs); (iii) statistics of time use, including their utilization to derive information on specific social and economic phenomena (by the Statistical Office and national rapporteurs); (iv) social indicators, including social reporting (by the Statistical Office and interested international organizations); and (v) statistics and classifications of socio-economic groups (by the ECE secretariat);

(c) Continuation of the work on (i) development and harmonization of concepts, definitions and classifications in specific fields of social and demographic statistics; (ii) links among economic, social and demographic statistics; (iii) statistics of time-use; (iv) social indicators; and (v) statistics and classifications of socio-economic groups, including the socio-economic structure and social mobility of the population.

#### IV. EXPERT GROUP ON DEVELOPMENT OF STATISTICS ON DISABLED PERSONS\*

##### Further work

##### 1. Data bases

20. The Expert Group recommended that the development of integrated data bases, at the national and international levels, should be explored as a strategy for maximizing the utility of information on disability and disability services. The data bases should include, in addition to available survey data, statistics from registration records, surveys of service providers, studies of select populations for specific medical and scientific purposes, censuses and the like. Such data should be organized to facilitate retrieval of information to respond rapidly to specific policy issues. The system should also include a wide range of strategies for data dissemination, including procedures for policy simulations and interactive planning exercises. It should also include, in addition to disability, a wide range of related data, social, economic and environmental, within an integrated approach.

21. It was agreed that the technical difficulties in implementing such a data base were considerable and would require both evaluation of basic principles and feasibility studies. The initial efforts in evaluating such a data base concept should be:

(a) A feasibility study of select components (for example, bibliographical materials and data sources) of such a system at the national and international levels;

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\* Excerpted from the report of the Expert Group (ESA/STAT/AC.18/7), which met at Vienna from 2 to 6 April 1984. The meeting was convened by the Statistical Office and the Centre for Social Development and Humanitarian Affairs of the United Nations Secretariat.



(b) Evaluation by a group of experts of the specific technical components of a data base system;

(c) Provision of assistance and training in appropriate technical and operational areas.

## 2. Improvement of dissemination

22. At the meeting, it was agreed that dissemination was an issue that required much more emphasis in survey work and in methodological studies intended to support such work. The Expert Group noted that its recommendation on development of data bases was one approach to the issue. It also agreed that assessments should be undertaken in all regions on the availability and uses of statistics concerning disabled persons.

23. Finally, it agreed that further work recommended in connection with monitoring and evaluating the World Programme of Action concerning Disabled Persons would contribute substantially to improved dissemination.

## 3. Monitoring and evaluation

24. A representative of the Centre for Social Development and Humanitarian Affairs described the steps that have been taken to date by the Centre concerning procedures to be followed in monitoring and evaluating progress in implementing the World Programme of Action concerning Disabled Persons.

25. It was agreed that, in order to develop suitable indicators for monitoring and evaluation, a conceptual framework should be developed showing linkages between policy goals and programme objectives and items of the World Programme of Action concerning Disabled Persons. Such a conceptual framework would also be useful for determining the processes of monitoring and evaluation to be carried out at the country and international levels, the development of statistical bases for compiling those indicators, and the promotion and implementation of work in the countries.

26. The Expert Group recommended that:

(a) A study should be prepared on the selection and compilation of indicators for monitoring and evaluating the implementation of the World Programme of Action at the national, regional and international levels, and on the development of a conceptual framework for use in monitoring and evaluating progress made in implementing the World Programme of Action concerning Disabled Persons;

(b) Statistics and indicators for monitoring and evaluating the World Programme of Action should be compiled and analysed at the national and international levels, based on local and national data collection programmes.

#### 4. Technical co-operation

27. The Expert Group recommended that there should be an expansion in scope of the following activities of the United Nations system:

(a) Training for users and producers of statistics on disabled persons in developing countries regarding techniques of data collection, dissemination and use and preparation of training materials specifically concerned with disability issues;

(b) Direct technical co-operation with countries and regions in the development and use of their statistics on disabled persons;

(c) Collaboration with NHSCP to include disability topics in survey programmes of interested countries and to assess changes where base-line data had already been collected.

#### V. ESCAP SEMINAR ON SOCIAL AND RELATED STATISTICS\*

##### Work in the field of social statistics and indicators

28. Following the detailed discussions of substantive items, the Seminar considered what possible activities might be undertaken, by both the countries and the secretariat, to maintain as well as enhance the development of social and related statistics. A secretariat paper (STAT/SSRS/CRP.10) provided an overview of the following relevant issues:

(a) The objectives and needs of each country and how they would determine the relevance of certain social statistics and indicators;

(b) The urgency for much greater co-operation and co-ordination between producers and users, including non-governmental users of social statistics and indicators;

(c) The need to focus on the disadvantaged and deprived groups, which must be clearly identified;

(d) The identification of the phenomena that required measurement;

(e) The need for detailed discussions to determine the nature and direction of work on a socio-economic classification;

(f) The need to explore possibilities for the greater integration of statistics from a variety of sources;

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\* Excerpted from the report of the Seminar, which met at Seoul from 22 to 28 May 1984, (STAT/SSRS/13, paras. 73-84). The meeting was convened by the Statistics Division of the ESCAP secretariat, in co-operation with the Government of the Republic of Korea.

- (g) The need for the development and selection of key indicators;
- (h) The need for more research on the sensitivity of indicators;
- (i) The development of an integrated statistical system through the use of more advanced computer technology and wider accessibility to data files;
- (j) The integration of social statistics through the development of household survey capability committed to the use of standard classifications and procedures;
- (k) The urgent need for the training of key personnel in social statistics;
- (l) The encouragement of greater technical co-operation among developing countries;
- (m) The need for further technical meetings to pursue follow-up action.

29. The Seminar strongly endorsed those ideas. It urged countries, international agencies and the secretariat to pay continued attention to the development of social statistics, while bearing in mind that developing countries still suffered from major gaps in their statistical knowledge and capability in certain fields. The first priority might therefore be to work towards filling those gaps.

30. More specifically, the Seminar supported greater dialogue between users and producers of statistics on a regular basis. Such dialogue might be more productive if it were focused on particular subjects, as was being successfully tried in some countries. The participants in the dialogue should include, besides the official users of statistics, representatives of non-governmental organizations, research groups and the private sector. The interface between the users and producers of data should cover not only the determination of priorities and co-ordination of overall national statistical activities but also the improvement and evaluation of the quality of data. Policies and facilities regarding a more widespread sharing of primary data, without breaching existing regulations or confidentiality, might also be usefully considered during that dialogue.

31. The disciplines and subject-matter covered within the general scope of social statistics were very wide and there was, therefore, a need for elaborate co-ordinating machinery in developing integrated social statistics systems. From a national viewpoint, the most appropriate authorities to carry out that function were the national statistical offices. Co-ordination might prove to be more effective if that role could be endorsed by national statistical advisory councils, where they exist, especially where such councils represent both government and non-government agencies. In countries where it was not feasible for an advisory council to take on the task of co-ordination, a focal role could be played by the national statistical office alone. That would ensure, among other things, that the international agencies would be provided with data that were consistent and that had national coverage. Greater use of all available data might also be ensured since it was recognized that in many countries full use of the existing statistics was not made. A larger co-ordinating role for the national statistical office would also promote more efficient use of scarce governmental resources available

for social statistics. At the regional level, it might be feasible for the secretariat to assume responsibility as a clearing-house for information on country activities. To provide better co-ordination at the regional level between international and other agencies working on the development of social statistics or indicators, the Seminar suggested that the establishment of a regional forum for inter-agency co-ordination and related statistics should be considered.

32. Training in social statistics was important and urgent. Training opportunities available within and outside the region might therefore be exploited and utilized more fully.

33. The role of NHSCP in building national capabilities in social and related statistics was strongly endorsed. Given the limitations of the data obtained from censuses and from various administrative records, multipurpose household surveys provided the greatest promise for yielding timely data in sufficient detail to assist in planning social development, monitoring the progress of social programmes, and evaluating the success of social policies and their interrelations with economic and more general aspects of national development.

34. Technical co-operation among developing countries was also a useful means of promoting training and social statistics development generally. The Seminar supported the principles of technical co-operation among developing countries and urged member countries to implement those principles wherever possible.

35. The Seminar expressed the view that in its deliberations many of the problems in developing systems of social statistics were addressed. However, it also acknowledged that many issues remained unresolved and that the most important of those would need to be incorporated into an agenda for future activities. There was general consensus that the most suitable approach for tackling the more complex technical issues such as a socio-economic classification, the selection of key indicators, and the establishment of information networks, among others, would be to convene a meeting of a specialized working or expert group. The Seminar urged the secretariat to consider the appropriate timing and terms of reference for such a meeting.

36. The Seminar noted the statistical requirements of various world programmes of action and urged greater national attention and co-ordination at the international level on such priority topics as women, children, youth, disability and aging, among others.

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