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**Stocktaking Report on Social Monitoring and Reporting in Europe**

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Summary

This report seeks to take stock of major social monitoring and reporting activities existing in Europe at national as well as supranational levels. While the currently flourishing debate on measuring well-being and progress “beyond GDP” has a strong focus on discussing why ‘new’ sorts of indicators going “beyond GDP” are needed and proposing new measurement, monitoring, reporting or even accounting initiatives, this debate does not always seem to be sufficiently aware and take notice of the many activities, which do already exist.

The activities covered by this stocktaking report are aimed at regular monitoring of as well as reporting on the living conditions and well-being of the population and their changes over time. Social monitoring and reporting activities provide quantitative information and empirically based analytical knowledge on well-being and progress in a single society or groups of societies – like the European Union – to be used for different purposes, including policy making. This report covers activities at national and supranational levels, focusing at comprehensive social reports and monitoring instruments, while monitoring and reporting activities in the field of sustainable development are only partially included.

Providing a systematic overview over the variety of social monitoring and reporting activities currently going on in Europe, turns out to be more than just a pure academic stocktaking exercise. By documenting and allowing better access to this information, the report also aims to establish linkages between past and current activities and to form a more solid fundament for present and future discourses and initiatives in the field of measuring and monitoring well-being and progress. In other words, this stocktaking report is first and foremost to be considered as a contribution to enhance the future measurement of well-being and societal progress ‘beyond GDP’ and to improve respective information infrastructures. To this end, the report does not only seek to identify blind spots at the European map of social monitoring and reporting, but even more aims to present, discuss and assess different approaches as well as to flag “good practices” in the light of the current debate about measuring and monitoring well-being and progress beyond GDP. Based on the inventory and descriptions of as well as analytical reflections on social monitoring and reporting activities, the final parts of the report also identify common patterns and trends and present suggestions for future improvements and research agendas.
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1. Introduction: Social Monitoring and Reporting in Europe

Aims and Objectives

This report aims to take stock of major social monitoring and reporting activities existing in Europe at national as well as supranational levels. While the currently flourishing debate on measuring well-being and progress “beyond GDP” strongly focuses on discussing why “new” sorts of indicators that go “beyond GDP” are needed and proposes new measurement, monitoring, reporting or even accounting initiatives, this debate does not always seem to be sufficiently aware and to take notice of the many activities that already exist. The most influential report by the “Commission on the Measurement of Economic Performance and Social Progress” (Stiglitz, Sen, Fitoussi 2009), for example, seems to largely overlook many of the available approaches, instruments and ongoing activities for measuring and monitoring well-being and the quality of life. Even the long and esteemed tradition of French social reporting – not to mention the social monitoring and reporting activities in many other nations in Europe and beyond – have not been noted by the commission established by the French Government, although these social reporting activities have contributed considerably in terms of measuring and monitoring well-being and social progress within French society beyond economic accounting and GDP (Noll 2011: 114f.).

Providing a systematic overview of the variety of social monitoring and reporting activities currently going on in Europe thus turns out to be more than just a pure academic stocktaking exercise. By documenting and allowing better access to this information, this report also aims to establish linkages between past and current activities and to form a more solid fundament for present and future discourses and initiatives in the field of measuring and monitoring well-being and progress. In other words, this stocktaking report is first and foremost to be considered as a contribution towards enhancing the future measurement of well-being and societal progress “beyond GDP” and to improve respective information infrastructures. To this end, our report will not only align the landscape and seek to identify blind spots in the European map of social monitoring and reporting, but above all, present, discuss and assess different approaches as well as flag “good practices” in the light of the current debate on measuring and monitoring well-being and progress beyond GDP. Based on the inventory and descriptions of, as well as analytical reflections on, social monitoring and reporting activities, the final parts of the report also seek to identify trends and common patterns, as well as achievements, gaps and deficiencies, and will make suggestions for future developments and research agendas.
Background

Social monitoring and reporting activities are nowadays integral parts of the complex information systems in many nation states as well as international and supranational organizations like the OECD, the European Union and the United Nations (Noll 2004: 163). Some of these activities can be traced back as far as to the early 1970s – such as the national social reports in France, the United Kingdom and the Netherlands – while others are more recent. The majority of currently existing social monitoring and reporting activities turn out to be direct or indirect outcomes of the so-called “social indicators movement” (Land 1983; Noll/Zapf 1994, Noll 2004) that emerged in the 1960s, proposing for the first time a call to measure and monitor the well-being of individual citizens and populations more adequately by going beyond the traditional approaches of regular economic accounting and reporting schemes. In a pioneering volume, published in the mid-1960s and edited by Raymond Bauer, “Social Indicators” were defined as “statistics, statistical series, and all other forms of evidence that enable us to assess where we stand and are going with respect to our values and goals” (Bauer, 1966: 1). Similarly, Mancur Olson – an American economist and social reporting pioneer – highlighted measuring well-being as the primary function of social indicators by defining a social indicator as ”a statistic of direct normative interest which facilitates concise, comprehensive and balanced judgements about the condition of major aspects of a society. ...It is a direct measure of welfare and is subject to the interpretation that if it changes in the 'right' direction ...things have gotten better, or people are 'better off’” (Olson 1969: 97). The potent mission of the social indicators movement, which had its origin in the United States, and which proposed new approaches of measuring well-being or quality of life “beyond GDP”, was soon taken up in Europe by scholars like Erik Allardt (Finland), Wolfgang Zapf (Germany), Sten Johansson (Sweden), and, not least, Jacques Delors (France), the subsequent President of the European Commission (Delors 1971).

This first “beyond GDP” movement of the 1960s and 1970s resulted in a variety of research reports and initiatives, which prepared the ground for different sorts of social monitoring and social reporting activities in subsequent years (Noll 2011). Among those path-breaking research projects and activities in the field of measuring and monitoring well-being were the "SPES-Project" led by Wolfgang Zapf in Germany, resulting in a German System of Social Indicators (Zapf 1979), the "Scandinavian Welfare Survey" project headed by Erik Allardt (1972), and the "Swedish Level of Living Survey" project headed by Sten Johansson (1973), to name just a few. As part of the Social Indicators Movement, national governments and statistical institutes in several countries as well as supranational organizations likewise took up the issue of social monitoring and reporting beyond the traditional economic approaches. A most prominent example of those early activities in the field of measuring well-being is a large-scale OECD project, the „Programme of Work on Social
Indicators”, which was launched in the early 1970s and discontinued in the mid-1980s (OECD 1982; Bertrand, 1986/1987) after publishing a series of working documents and the single report “Living Conditions in OECD Countries” (OECD 1986). In addition, Eurostat – as part of the European Commission - has been involved in social monitoring and reporting activities since the early 1980s: The report ”Social Indicators for the European Community”, published twice in 1980 and 1984, was replaced by the report ”Social Portrait of Europe” in the early 1990s. In the mid-1990s Eurostat established a task force on “social indicators”, which aimed to help Eurostat define a proposal for an action program for social indicators and social reporting, aiming to develop systematic reporting on quality of life in Europe. While some of the early initiatives aimed at more adequate measurement of individual and societal well-being at national and supranational level failed to get off the ground and to be implemented as part of the regular information infrastructure, others were successful, resulting in regular monitoring and reporting activities, some of them still existing.

Social Monitoring and Reporting - What Are We Talking About?

What do we actually mean by social monitoring and reporting? The activities we are referring to under these labels are aimed at regular monitoring and analysis of as well as reporting on the living conditions and well-being of the population and their changes over time. Social monitoring and reporting thus generates – comprehensive or domain-specific – quantitative information and empirically based analytical knowledge on well-being and progress in a single society or groups of societies – like the European Union – to be used for different purposes, e.g. policy making. Social monitoring may be defined as a systematic and continuous observation of individual and societal well-being and related changes across time by making use of quantitative measurement instruments, e.g. indicator systems and indicator dashboards or composite indexes. Social reporting goes beyond social monitoring by also incorporating elements of analysis, interpretation and evaluation and may thus be defined as a more or less institutionalized collection, presentation and analysis of data to be used to comprehensively assess the life situation and well-being of the population and their changes over time (Noll 2004: 163). According to a definition used in New Zealand’s Social Report, the aim is “to measure what is important - what a society cares about. In order to do this, agreement is needed about what to measure. This involves making some explicit value judgements about what quality of life means, and about the characteristics of society considered desirable” (Social Report New Zealand 2001: 8). Regarded from a more explicit policymaking point of view, social reporting has also been defined as “the description and analysis of the living conditions of the population seen in relationship to the objectives and measures of an ensemble of social policy fields” (Gilomen 1995).
Relevant distinctions in social monitoring and reporting activities concern the following characteristics:

- Comprehensiveness: comprehensive versus specialized focus on particular societal domains or population groups;
- The level of society addressed: e.g. supranational, national or local level;
- The institutional setting or background: e.g. statistical office, research institute, governmental agency or NGO.

More generally, social monitoring and reporting activities typically seem to be characterized by the following basic properties (Noll 1999; Noll 2012):

- A strong focus on the well-being of individual citizens and the general population;
- The units of observation are individuals and private households, rather than institutions and organizations;
- Measurement turns out to be primarily focused on outcomes rather than inputs;
- Following a normative perspective, social monitoring and reporting seeks to identify progress or regress as well as inequalities – advantages and disadvantages – across groups, regions, nations etc.;
- Policy orientation: social monitoring and reporting aims to provide expert knowledge for political elites, administrations and governments;
- Empirical or quantitative measurement approach: The information provided usually focuses on quantitative empirical data and is based on quantitative empirical analysis;
- Representativeness: The information provided by social monitoring and reporting activities claims to be relevant for the whole population or parts of it and thus needs to be based on representative data;
- Timeliness and continuity across time;
- Intelligibility: Since social monitoring and reporting activities do not only address academics, policy makers and other experts, but also the ordinary citizen, understandability is of crucial importance.

Since the publication of “Toward a Social Report” – a prototype of a social report conceptualized and authored by the American economist Mancur Olson on behalf of the US Government Department of Health, Education and Welfare (1969) – social reports have been published regularly for many years in numerous countries as well as by supranational organizations. Some of the most well-known national social reports, e.g. the British Social Trends, the Dutch Social and Cultural
Report, and the French Données Sociales, have been published regularly since the early 1970s. Besides social reports numerous social monitoring activities have also been established as an outcome of research on social indicators: Examples of monitoring initiatives implemented as early as in the 1970s are sets or systems of social indicators (Noll 2014a) providing aggregate level information – such as the German System of Social Indicators (Noll 2014b) or the Swedish survey based on the ULF system (Vogel 1990) – as well as “Quality of Life Surveys”, e.g. the “Scandinavian Welfare Survey” (Allardt 1972) and the “German Welfare Survey” (Noll 2014c), providing individual level information on well-being and progress. These and other early social monitoring and reporting initiatives prepared the ground for numerous others appearing in subsequent years, many of them being covered by this report.

Functions
Social monitoring and reporting aims to provide information for citizens and the general public (enlightenment function), but also seeks to inform policy makers in a broad sense. According to early considerations on the functions of social monitoring and reporting by the Swedish scholars Sten Johansson (2001) and Joachim Vogel “social reporting belongs to the democratic infrastructure and has a special political function. To put it simply, social reporting places welfare issues on the political agenda. It supplies material to the public debate, influencing the media and, indirectly, the administration” (Vogel 1990: 441). Duncan MacRae (1985) suggested distinguishing three ways of affecting public policy by social monitoring and reporting: problem definition, policy choice and program monitoring. According to Brown and Corbett, five basic policy-relevant uses of social monitoring and reporting activities may be distinguished, which they consider as a “hierarchical typology of uses which incur progressively exacting demands: description, monitoring, setting goals, outcomes-based accountability and evaluation” (Brown/Corbett 1997: iii). While monitoring instruments and social reports have been quite successfully used for purposes of description, monitoring and the identification of problems to be addressed by policy-making agencies, their usability for purposes like setting goals, program evaluation and impact assessment seems at least to be more difficult and demanding or may even be challenged.

Content and Coverage of the Report
The stocktaking conducted within Work Package 5 of the e-Frame Project covers social monitoring as well as social reporting activities.

Social monitoring activities to be taken into account include:

- Well-being indicator sets and indicator systems;
- Composite Indexes of well-being.
Social reporting activities to be taken into account include:

- Comprehensive Social Reports, or reports that at least cut across various life domains.

Social reports restricted to specific domains – like health, family, or education – or to specific population groups – like children, the elderly, or women – which exist in many countries, are not included for practical reasons, because this would exceed the limits of the proposed stocktaking task. Reports on poverty are taken into account only when multiple dimensions of poverty are addressed, which means that they are not restricted to poverty in terms of income or financial aspects only.

The distinction between social monitoring and social reporting activities is not always clear-cut and should be understood as pragmatic. In practice, both types of activities are sometimes even combined: Monitoring activities may be supplemented by reports, and reporting activities may be supplemented by monitoring instruments or at least by some sort of additional supply of (online) information in terms of well-being indicators or indices.

Beyond social monitoring and reporting activities in a strict sense, this stocktaking report also includes, to some extent, activities of monitoring (indicators, indexes) of and reporting on "sustainability", but only when issues of “social sustainability” are covered. Moreover, projects and policy initiatives related to social monitoring and reporting will be taken into account in case that they are considered as particularly innovative or promising, even if they have not yet been implemented and have not resulted in regular monitoring and reporting activities.

The report does not cover surveys and/or databases, e.g. the European Union Statistics on Income and Living Conditions (EU-SILC), the European Quality of Life Survey (EQLS) or the European Social Survey (ESS), in a systematic and comprehensive way, although such activities may be referred to occasionally.

This stocktaking report focuses on social monitoring and reporting activities at supranational and national level. The various activities existing at sub-national levels, like regions or cities and local communities, are not covered. Activities at supranational level to be included are those undertaken by major supranational organizations, like the OECD, United Nations, or the European Council and the European Union, but also those by NGOs and research institutes, given that these activities are relevant from a European point of view. Stocktaking at national level is focused on relevant social monitoring and reporting activities in the EU member states. Non-European activities are thus only exceptionally included. For the purposes of this report, the EU member states are
grouped into four country clusters: northern Europe, including the Baltic countries, western and central Europe, eastern Europe and southern Europe.

As a major outcome of our work in taking stock of social monitoring and reporting activities in Europe a database (MS Access) has been set up, which incorporates a variety of information for numerous activities that have been identified and considered as relevant. It distinguishes, first of all, among different types of activities: (1) sets/systems of social indicators and indices; (2) social reports; (3) projects related to social monitoring and reporting; (4) other relevant activities, e.g. databases. For each activity the following characteristics have been identified and saved in the database:

- Official name or title of activity
- Name of institution publishing/hosting activity
- Type of Institution (e.g. Government, NSI, research institute)
- Level /scope of activity (e.g. national, supranational)
- Country where activity is located
- European region where activity is located (e.g. East, North, South)
- Year of first edition/launch of activity
- Year of latest edition/end of activity
- Frequency, periodicity of activity
- Objective and/or subjective dimensions considered?
- Sustainability issues considered?
- Web-link to activity

Although the stocktaking exercise conducted is not aimed at completeness, but rather seeks to identify those activities which seem to be directly relevant, the database currently includes 148 national level social monitoring and reporting activities in 32 European countries as well as some selected non-European nations (e.g. U.S., Canada, New Zealand); moreover, the database covers 89 pan-European or supranational social monitoring and reporting activities. This report largely builds on the content of the database, from which selected extracts will be published in various sections of this report.

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2 The Social Indicators Research Centre of GESIS ([www.gesis.org/social-indicators](http://www.gesis.org/social-indicators)) seeks to continously update this “Social Monitoring and Reporting in Europe” database in years to come.
The results of the stock-taking will be presented and synthesized in the following parts of this report. Chapters 2 and 3 will give an overview of existing social monitoring and reporting activities at the supranational and national level, and will highlight some “good practices”. The subsequent parts of the report will identify patterns and trends in European social monitoring and reporting activities (Chapter 4). The final Chapter on “Looking forward” is supposed to reflect on achievements and deficiencies, to discuss options and dilemmas, and to identify issues to be put on future research and policy agendas.
2. Social Monitoring and Reporting – Activities at European Level

This section will focus on social monitoring and reporting activities with a cross-national, European scope. The following overview thus includes all those major reports and monitoring instruments that cover all or subsets of nations in Europe, but must not necessarily be restricted to European countries. The section will be subdivided into two parts. While the first part will have a focus on the activities under the auspices of the European Union and supranational organizations, a second part will address activities of other – mostly national – stakeholders such as research institutes and think tanks, which reach out beyond the national level and do have a European scope.

2.1. Activities by the European Union and Supranational Organizations

Unsurprisingly, European Union institutions and supranational organizations, e.g. the OECD, the World Bank or the United Nations, have always played a prominent role when it comes to social monitoring and reporting activities with a pan-European or at least cross-national scope. Early activities of this sort include for example projects and reports on social indicators, but also various social reports. In recent years we have seen a range of new and quite influential activities in the field of social monitoring and reporting initiated by supranational organizations and the European Union, many of them resulting from broader policy strategies and projects.

Among these strategies and projects to be highlighted are the Beyond-GDP initiative (www.ec.europa.eu/environment/beyond_gdp/) conveyed by the European Commission (European Commission 2009) and the OECD project on the Measurement of Well-being and Progress (www.oecd.org/statistics/measuringwell-beingandprogress.htm), which both have had an enormous impact and triggered numerous other initiatives at national and supranational levels. At the European Union level, the Open Method of Coordination (OMC), which had been introduced by the Lisbon European Council (2000) as an approach to implementing the EU strategy for sustained economic growth and greater social cohesion, has also played an important role as a framework for indicator development and various social monitoring and reporting activities. As a method of “soft regulation”, the OMC is supposed to contribute to a convergence of social conditions within the European Union by defining binding common objectives, while institutional solutions and policy choices are left to national governments (principle of subsidiarity). In this context, periodic monitoring of goal attainment and benchmarking, based on a set of agreed upon indicators is of crucial importance, not least to identify and share best practices and to allow mutual learning. Until now, the OMC has been implemented in areas such as social inclusion and employment, health care and long-term care and pensions. The Indicators Subgroup of the Social Protection...
Committee plays a key role in the process of developing common indicators for EU member states, but also external experts have contributed considerably (see e.g. Atkinson et al 2002). Europe 2020, following up on the so-called Lisbon strategy, is another very important policy strategy, which also turns out to be relevant as a framework for social monitoring and reporting activities. At the level of the United Nations, the Millennium Development Goals Strategy – launched in 2001 in cooperation with the World Bank, the OECD and the IWF and seeking to reduce poverty and inequalities, improving health and education as well as to foster environmental sustainability – has been accompanied by various monitoring and reporting activities too.

Around these and other policy strategies several social monitoring and reporting activities, which thus are directly policy-driven, have been launched in recent years, some of them being explicitly referred to in the sections below.

2.1.1 Social Monitoring

As mentioned above, many of the current social monitoring activities of the European Union are related to overarching policy strategies, in which sets of indicators are frequently used as quantitative measures of goal achievement. As it would certainly go beyond the scope of this report to present all the respective activities comprehensively and at full length, table 2.1.1.1 will follow a selective and exemplary approach and will only supply basic information for each of those addressed.

Europe 2020 Indicators: Without doubt, the Europe 2020 strategy “for smart, sustainable and inclusive growth” currently belongs to the most important and popular European Union policy strategies aiming to achieve five key policy goals by 2020. A set of eight headline indicators, such as the employment rate, early school leavers rate, greenhouse gas emissions, people at risk of poverty or social exclusion, has been selected with a view to monitoring achievement and progress toward those goals. Related data are provided by Eurostat and are accessible online (http://epp.eurostat.ec.europa.eu/portal/page/portal/europe_2020_indicators/headline_indicators)
### Table 2.1.1.1: Supranational Social Monitoring Activities: European Commission

<table>
<thead>
<tr>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe 2020 Indicators</td>
<td>2010</td>
<td>2014</td>
</tr>
<tr>
<td>Quality of Life (QoL) indicators</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Employment and social policy indicators (OMC, overarching indicators)</td>
<td>2006</td>
<td>2011</td>
</tr>
<tr>
<td>Indicators of the social inclusion strand (OMC)</td>
<td>2006</td>
<td>2010</td>
</tr>
<tr>
<td>Indicators of the pension strand (OMC)</td>
<td>2006</td>
<td>2011</td>
</tr>
<tr>
<td>Indicators of the health and long term care strand (OMC)</td>
<td>2006</td>
<td>2010</td>
</tr>
<tr>
<td>Laeken Indicators (Lisbon Strategy)</td>
<td></td>
<td>2001</td>
</tr>
<tr>
<td>Structural Indicators (Lisbon Strategy)</td>
<td>2000</td>
<td>2010</td>
</tr>
</tbody>
</table>

**Open Method of Coordination**: Sets of commonly agreed indicators (approved in 2006, 2008 and 2009) have also been developed as part of the different strands related to the Open Method of Coordination:

- Employment and Social Policy Indicators
- Indicators of Social Inclusion
- Pension Indicators
- Health and Long-term Care Indicators

Some of the indicator sets distinguish between “primary” and “secondary” or “core” and “context” indicators. Eurostat publishes data related to all of the indicator sets, but it is not always clear whether and to which extent the data are still being updated continuously. The indicator sets are currently used for various monitoring activities at European (e.g. Social Protection Performance Monitor, Social Indicators Short List) and national levels (e.g. National Strategy Reports).

**EUROSTAT - Quality of Life Indicators**: An interesting recent social monitoring activity at the European Union level is the EUROSTAT - Quality of Life Indicators, which have been developed within a project initiated by the European Statistical System Committee (European Statistical System
The initiative is closely related to the European Commission’s “GDP and beyond – measuring progress in a changing world” communication, but is obviously also a response to the report of the “Commission on the Measurement of Economic Performance and Social Progress” (Stiglitz et al. 2009). The set of quality of life indicators selected covers nine domains/dimensions:

- Material living conditions
- Productive or main activity
- Health
- Education
- Leisure and social interactions
- Economic and physical safety
- Governance and basic rights
- Natural and living environment
- Overall experience of life

The data used for the quantification of the indicators are taken from different sources within the European Statistical System, such as the EU-SILC, European Labour Force Survey, European Health Interview Survey, and other sources. In the case that official data are not yet available, data from sources outside the ESS are sometimes referred to. At present, the Quality of Life Indicators project is still under construction and is not yet fully developed.

As a tripartite European agency, the European Foundation for the Improvement of Living and Working Conditions (Eurofound), whose role is to provide knowledge in the area of social and work-related policies, is also an active player in the field of social monitoring. Major Eurofound activities on this account are two regular pan-European surveys:

- European Quality of Life Survey (EQLS)
- European Working Conditions Survey (EWCS)
In terms of general social monitoring, the European Quality of Life Survey is of particular importance. Up to now, it was carried out in 2003, 2007 and 2011/2012; a further round is envisaged for 2016. Based on this survey, Eurofound monitors and analyzes developments in quality of life in Europe from a comparative perspective. Results are published regularly in various reports, such as overview reports and analytical reports, focusing on trends in quality of life and special topics, as well as enlargement country reports focusing on the social situation in candidate countries. Recent reports in this series include Quality of Life in Europe: Impacts of the Crisis (2012), Quality of Life in Europe: Subjective Well-Being (2013) and Quality of life in Europe: Trends 2003–2012 (2014). An interactive “Survey Mapping Tool” at Eurofound’s website additionally allows users to browse through the data and display data as maps, charts and tables (http://www.eurofound.europa.eu/surveys/smt/3eqls/index.EF.php).

Table 2.1.1.2 provides an overview of social monitoring activities launched by supranational organizations aside from the European Commission.

<table>
<thead>
<tr>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
</tr>
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<tbody>
<tr>
<td>OECD</td>
<td>How’s life - measuring well-being</td>
<td>2011</td>
<td>2013</td>
</tr>
<tr>
<td></td>
<td>Social data and indicators</td>
<td>2001</td>
<td>2011</td>
</tr>
<tr>
<td></td>
<td>Your Better Life Index</td>
<td>2011</td>
<td>2012</td>
</tr>
<tr>
<td>UN</td>
<td>Millennium Development Goals Indicators</td>
<td>2005</td>
<td>2013</td>
</tr>
<tr>
<td></td>
<td>Social Indicators (Handbook on Social Indicators)</td>
<td>1989</td>
<td>2011</td>
</tr>
<tr>
<td>UNDP</td>
<td>DevInfo</td>
<td>2004</td>
<td>2012</td>
</tr>
<tr>
<td></td>
<td>Human Development Index</td>
<td>1990</td>
<td>2011</td>
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<tr>
<td></td>
<td>International Human Development Indicators</td>
<td>1990</td>
<td>2011</td>
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<tr>
<td></td>
<td>Multidimensional Poverty Index</td>
<td>2010</td>
<td>2011</td>
</tr>
<tr>
<td></td>
<td>World Development Indicators</td>
<td>1997</td>
<td>2011</td>
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</table>
The OECD has been a key player in the field of social monitoring for many years. Leaving aside the early social indicators projects of the 1970s, the OECD, for example, has regularly published a compilation of *Social Data and Indicators* as part of its report *Society at a Glance* since 2001. This set of indicators addresses issues of self-sufficiency, equity, health and social cohesion and also includes general context indicators in the OECD member countries.

**OECD - Better Life Initiative:** Among the social monitoring activities launched by supranational organizations, the OECD’s *Better Life Initiative* is currently perhaps the most successful and popular approach towards measuring and monitoring well-being. The initiative was launched in 2011 as an outcome of the previous work around the project on the *Measurement of Well-being and Progress* and was also incisively stimulated by the Stiglitz et al. commissions report. The Better Life Initiative includes two main elements: the *How’s life* set of well-being indicators and the (composite) *Your Better Life Index*. In addition, the OECD also publishes a biannual report in print format (see below, table 2.1.2.2) titled “How’s Life”, assessing people’s well-being in OECD countries.

The How’s Life set of indicators covers the following 11 domains or dimensions of well-being:

- Housing
- Income
- Jobs
- Community
- Education
- Environment
- Governance
- Health
- Life satisfaction
- Safety
- Work-life balance

Each topic is addressed by one to four indicators, which are supposed to measure well-being outcomes. Indicators are currently only broken down by very few socio-economic characteristics, such as sex and socio-economic status. While the set of indicators up to now reflects current well-being exclusively, it is planned that the indicator set will also be complemented by indicators measuring the sustainability of well-being over time.
OECD: Better Life Index

The Better Life Index combines the information from the individual How’s Life indicators into one composite index of well-being (www.oecdbetterlifeindex.org). In a default setting, the index is calculated by averaging the indicators with equal weights. An online tool allows users however to vary the weighting schema and to attach their own weights to each of the topics.

The United Nations Organizations are engaged in several social monitoring activities, which cover European countries as well. A compendium of Social Indicators has been published by the United Nations’ Statistical Division regularly for many years. Indicators focus on five areas of concern: Population, health, housing, education and work. The interest and work by the UN on Social Indicators can be traced back as far as to the project Towards a System of Social and Demographic Statistics (United Nations 1975), headed by the subsequent Nobel laureate Sir Richard Stone in the 1970s. In 1989, moreover, an influential Handbook on Social Indicators was published by the UN (United Nations 1989).

The Human Development Index (HDI) and related Human Development Indicators, which are provided as part of the United Nations Development Program (UNDP), have received enormous public attention globally. Launched in 1990, the HDI as well as the circa 45 human development indicators – structured in 14 dimensions – are published in the annual Human Development Reports. Beyond the HDI, recent reports also include a number of additional composite indices such as the Multidimensional Poverty Index or the Gender Inequality Index. Originally, the development of the HDI and Human Development Indicators was inspired to a great extent by the eminent economists Mahbub ul Haq and Amartya Sen. The calculation of the HDI has been revised several times since its first release (http://hdr.undp.org/en).
A more recent activity of the United Nations – in collaboration with several partners – is the Millennium Development Goals Indicators - Project (www.un.org/millenniumgoals/). A set of 60 indicators has been selected with a view to monitoring progress toward the achievement of the eight internationally-agreed development goals (target date=2015). Results are published in Millennium Development Goals Reports, starting in 2012. DevInfo is a related UN database system set up for the purpose of monitoring the achievement of these Millennium Development Goals, as well as to disseminate and present respective information. 

Last, but not least, the World Bank has published the regularly updated Social Indicators of Development since the 1980s as another important and long-standing supranational social monitoring activity in the field of development and human welfare. The 26 indicators cover issues like child labor, gender inequality, refugees and asylum seekers. Indicators also address issues of gender disparities related to key topics such as education, health, labor force participation, and political participation. The selected social Indicators are part of the World Development Indicators, which are a compilation of more than 300 indicators, structured in 18 dimensions and presented for 214 countries from 1960 until today.

### 2.1.2 Social Reporting

The following section will present a brief overview of the most relevant social reporting activities carried out by European Union Institutions as well as those under the auspices of supranational organizations (table 2.1.2.1). Several of the previously presented social monitoring activities are – as has already been mentioned – accompanied by the publication of printed reports. In the following section these reports will not be presented in detail again, but rather the focus will be on those social reports not yet mentioned.

Encouraged by various European treaties, European Union institutions have been engaged in social reporting activities at the European level for many years. The report The Social Situation in the European Union – a follow-up publication to the Social Portrait of Europe – used to be the flagship social reporting activity by the European commission during the first decade of the century. It aimed at fulfilling the Commission’s obligation, according to Article 159 of the Treaty, to report on a wide range of social policy areas. As an annual report it was published jointly by the Directorate General of Employment, Social Affairs & Equal Opportunities and EUROSTAT from 2000
until 2010. The report – focusing on varying topics in each edition – covered issues of the quality of life of people living in Europe, demographic trends and issues of social conditions in a broad sense, with a view to providing background information for social policy development. Since 2011 the Social Situation Report has been replaced by a report on Employment and Social Developments in Europe, which also replaces the previous Employment in Europe report. In addition, the Commission publishes the Employment and Social Situation Quarterly Review, which provides continuously up-to-date statistical information and analytic insights around these topics.

In 2013 the European Commission and its Directorate General for Employment, Social Affairs and Inclusion launched the new report Social Europe - Current Challenges and the Way Forward. It is the first issue of a report to be published annually, prepared by the Social Protection Committee in the context of the social division of the Open Method of Cooperation (OMC) following the previously published series of “Joint Reports on Social Protection and Social Inclusion”. The Social Protection Committee is a committee of high level officials from all EU Member States and the Commission. The new report focuses on the social situation in the European Union and key social trends, the evolution of resources and expenditure for social protection policies, issues of financing and expenditure of social protection, and key policy developments within the three strands of the social OMC. An annex presents country profiles for each of the member states. The new report makes use of the “Social Protection Performance Monitor”, an instrument developed to

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3 For more details see the introduction to the 2013 edition of this report.
identify the main social trends to be observed and key positive social developments in the European Union by the usage of a dashboard of main social indicators.

Table 2.1.2.2: Supranational Reporting Activities: other supranational organizations

<table>
<thead>
<tr>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
<th>Periodicity</th>
</tr>
</thead>
<tbody>
<tr>
<td>OECD</td>
<td>How’s life - measuring well-being</td>
<td>2011</td>
<td>2013</td>
<td>2 yrs</td>
</tr>
<tr>
<td>UN</td>
<td>Society at a Glance</td>
<td>2001</td>
<td>2011</td>
<td>2 yrs</td>
</tr>
<tr>
<td>UN</td>
<td>Millennium Development Goals Report</td>
<td>2005</td>
<td>2013</td>
<td>annually</td>
</tr>
<tr>
<td>UN</td>
<td>Report on the World Social Situation</td>
<td>1952</td>
<td>2012</td>
<td>since 2001: 2 yrs, formerly 4 yrs</td>
</tr>
<tr>
<td>UNDP</td>
<td>Human Development Report</td>
<td>1990</td>
<td>2013</td>
<td>annually</td>
</tr>
</tbody>
</table>

At the United Nations level, social reporting has similarly been considered as a major concern for decades (table 2.1.2.2). The Report on the World Social Situation ([www.undesadspd.org/ReportontheWorldSocialSituation.aspx](http://www.undesadspd.org/ReportontheWorldSocialSituation.aspx)) has been published regularly since the early 1950s. This report, now published biennially (until 2001 every 4 years), identifies social trends of international concern and provides analysis of major development issues such as poverty, inequality or the global social crisis. The UN’s most popular flagship report, the Human Development Report ([www.hdr.undp.org/en](http://www.hdr.undp.org/en)), launched in 1990, has been published annually since then. Focusing on varying themes in each issue, e.g. sustainability or migration, the Human Development Reports provide detailed information, such as the Human Development Index and a set of indicators, and thorough analysis regarding human development issues in a global perspective.

More recently, the UN also launched the Millennium Development Goals Report ([www.un.org/millenniumgoals/reports](http://www.un.org/millenniumgoals/reports)), which is related to the Millennium Development Goals Strategy (see above). Last, but not least, the World Bank has published a comprehensive annual social report as well since 1978, the World Development Report. Each edition addresses a specific development issue, such as jobs, gender equality or poverty.

2.2 Social Monitoring and Reporting Activities at European Level – Non Supranational Institutions

Although European Union institutions and supranational organizations are obviously the key actors when it comes to social monitoring and reporting activities at a supranational, European level, there are also some activities initiated and maintained by other institutions, such as research
institutes, think tanks or NGOs. The following section will present a sample of those activities considered particularly interesting and relevant (table 2.2).

Table 2.2: Supranational Social Monitoring Activities: National Institutions and Non-Profit Organizations

<table>
<thead>
<tr>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center for Global Development</td>
<td><em>Millennium Development Goals Progress Index</em></td>
<td>2009</td>
<td>2011</td>
</tr>
<tr>
<td>Center for Societal Progress, Germany</td>
<td><em>Fortschrittsindex/Progress Index</em></td>
<td>2010</td>
<td>2011</td>
</tr>
<tr>
<td>International Institute of Social Studies</td>
<td><em>Indices of Social Development</em></td>
<td>1990</td>
<td>2010</td>
</tr>
<tr>
<td>Legatum Institute (UK)</td>
<td><em>Prosperity Index</em></td>
<td>2011</td>
<td>2013</td>
</tr>
<tr>
<td>The New Economics Foundation - nef (UK)</td>
<td><em>Happy Planet Index</em></td>
<td>2006</td>
<td>2012</td>
</tr>
<tr>
<td>Social Indicators Research Center (ZSI)</td>
<td><em>European System of Social Indicators</em></td>
<td>2001</td>
<td>2014</td>
</tr>
<tr>
<td>Social Progress Imperative</td>
<td><em>Social Progress Index</em></td>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>Social Watch</td>
<td><em>Basic Capabilities Index (BCI)</em></td>
<td>1990</td>
<td>2011</td>
</tr>
</tbody>
</table>

**European System of Social Indicators:** The European System of Social Indicators is one of the few comprehensive indicator systems to be used to continuously monitor the individual and societal well-being of European citizens in terms of quality of life, social cohesion and sustainability, as well as changes in the social structure of European societies (Noll 2002; Noll 2014). This indicator system, developed and maintained by the Social Indicators Research Centre at GESIS - Leibniz Institute for the Social Sciences in Germany, covers the EU member states, Norway and Switzerland as well as Japan and the United States as two major non-European reference societies. At present there are time-series data available for more than 700 indicators from 10 out of the projected 13 life-domains. A selection of key indicators address dimensions of well-being and social change considered to be particularly relevant. Year-by-year time series start at the beginning of the 1980s, as far as data availability allows. For selected indicators regional disaggregation is available at the NUTS-1 level. The *Social Indicators Monitor - SIMon* ([www.gesis.org/simon](http://www.gesis.org/simon)) provides comfortable online access to the time series data from the European System of Social Indicators.

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5 SIMon also provides access to the time series data from the „German System of Social Indicators“, which originally was developed as early as the mid-1970s (Noll 2014b)
While the European System of Social Indicators is – according to our knowledge – currently the only comprehensive social monitoring activity outside the world of supranational organizations in terms of indicator systems, there are several composite index activities with a European scope. Among those activities, which have been initiated by supranational non-profit organizations or research institutes in recent years, are the Basic Capabilities Index, launched in 1990 by the international network Social Watch (www.socialwatch.org), as well as a sample of Social development Indices issued by the Institute of Social Studies (www.indsocdev.org). There are also a couple of composite index activities with a European scope, launched by national institutions. Among those index activities are the Progress Index, launched by the Center for Societal Progress in Germany (www.fortschrittsindex.de), the Prosperity Index launched by the British Legatum Institute in 2011 (www.prosperity.com), as well as the Happy Planet Index (www.happyplanetindex.org), published by the London based New Economics Foundation.

Up to now we have seen very few social reporting activities with a European scope initiated outside supranational organizations. A few publications resembling social reports, launched by the European Centre for Social Welfare Policy and Research, aim to monitor living standards and life chances for different groups within society across the EU and to evaluate how policies affect them. The European Observatory on the Social Situation - Monitoring Report was published from 2005 to 2009. Moreover, the Hungarian research institute Tárki published a European Social Report twice, in 2008 and 2009, which however were focused on demographic issues as well as the labor market, income and housing situation of households in Europe. The same institution has also published another focused report on European Inequalities: Social Inclusion and Income Distribution in the European Union. A non-official, research based comprehensive European Social Report has not been published yet.

2.3 Sustainable Development

Monitoring and reporting activities on sustainable development at a supranational level are in their majority guided by sustainable development strategies initiated by supranational organizations, such as, for example, the Sustainable Development Strategy of the EU (2001, renewed 2006) and the Europe 2020 Strategy, the 10-year strategy following the Lisbon strategy, which aims to achieve more sustainable and smarter growth. Monitoring and reporting activities in the field of sustainable development have also been stimulated by the initiative on Measuring Progress, Well-Being and Sustainable Development by the European Statistical System’s Sponsorship Group, the recommendations launched by the Stiglitz-Sen-Fitoussi Report, as well as the “GDP
According to the European Sustainable Development Strategy, Eurostat regularly provides the Sustainable Development Indicators, updated every other year since 2005, and publishes the Monitoring Report Sustainable Development in the European Union, first published in 2011. Worth mentioning in this context are also a few FP7-research projects, which are related to issues of sustainable development: e.g. POINT - Policy Influence of Indicators (2008-2011) or INSTREAM - The Integration of Mainstream Economic Indicators with Sustainable Development Objectives (2008-2011).

In 2011 the OECD also launched a sustainable development strategy under the label “Green Growth”. Within this framework, the OECD has published the report Towards Green Growth: Monitoring Progress - OECD Indicators, presenting the conceptual framework for developing green growth indicators.

The Agenda 21 is the United Nations’ strategy for sustainable development. National, international and regional institutions are called on to implement the program through strategies, policies and procedures. There is also a Local Agenda 21 providing a framework for local level activities. The Agenda 21 was adopted in 1992 at the UN Conference on Environment and Development (UNCED) in Rio de Janeiro. The latest UN conference, Rio+20, was held in 2012. Reports on sustainable development, such as the CSD National Reports, which are based on the CSD Indicators at UN level, are chiefly published by the Commission on Sustainable Development (CSD).

There are also joint initiatives, in which several supranational organizations are involved. Worth mentioning here are the Working Group on Statistics on Sustainable Development and the Task Force on Measuring Sustainable Measurement, joint activities of UNECE, Eurostat and the OECD. This working group seeks to establish a common understanding of sustainable development and to define core principles of sustainability measurement. A framework and set of “suggested indicators to measure sustainable development” published in 2013 has been one important outcome (Joint UNECE/Eurostat/OECD Task Force on Measuring Sustainable Development 2013).

Other activities in the field of monitoring sustainable development include composite indices of sustainable development. One example is the Ecological Footprint index, developed by the international Ecological Footprint Network in 1990. It is supposed to measure a person’s demand on the biological capacity of the earth, or – in other words – man’s impact on nature. It has been calculated for individuals, groups of people (e.g. nations) as well as certain activities, but does not
cover social dimensions of sustainable development. The same applies to the Adjusted Net Saving index published by the World Bank in 2006. Other composite indices – in contrast – also include the social dimensions of sustainability: Among those indices are the Human Sustainable Development Index (UN 2010), which combines the Human Development Index with per capita carbon emissions, as well as the FEEM Sustainability Index, published for the first time in 2009 by the Italian Fondazione Eni Enrico Mattei, which covers economic, environmental and social dimensions. Last but not least, the Sustainable Society Index (SSI), released by the Dutch Sustainable Society Foundation in 2006, should be mentioned. It’s objective is to measure human, environmental and economic wellbeing, based on 21 indicators all together.

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6 For a recent critical review of the Ecological Footprint index see Giampietro/Saltelli (2014)
3. Social Monitoring and Reporting in Europe: National Activities

3.1 Northern Europe

This section on Northern Europe covers the Scandinavian countries (Denmark, Finland, Iceland, Norway, Sweden) as well as the Baltic States (Estonia, Latvia, Lithuania). Although the latter were part of the Soviet Union until regaining independence in the early 1990s and thus – due to their socialist past – also bear similarities to some of the Eastern European member states of the European Union, the Baltic countries have always maintained strong economic and cultural ties to the Scandinavian countries. The Scandinavian countries also provided economic and political support to the Baltic States after regaining independence and not least promoted the development of statistical services as well as social monitoring and reporting activities. There are thus some good reasons to consider the Baltic states as part of Northern rather than Eastern Europe in our stock-take of social monitoring and reporting activities.

Looking at the history of social monitoring and reporting, the Scandinavian countries certainly were among the forerunners and trendsetters and can thus look back on a long and rich tradition of those activities. Observers have pointed to the fact that "national social reporting obviously was promoted best in Europe under the preconditions of an articulated welfare state program of social policy, an interventionist orientation of government and innovative statistical agencies" (Noll/Zapf 1994: 5), conditions which were particularly well developed in Scandinavia. In contrast to the Scandinavian countries, social monitoring and reporting activities in the Baltic States are more recent and have emerged only after the transition to a post-socialist political system.

3.1.1 Social Monitoring

Table 3.1.1 presents an overview of the monitoring instruments identified in Northern Europe and specifies their main characteristics.

Overall, there is currently only a limited number of social monitoring activities going on in Scandinavia. Two more recent ones have been initiated in Finland: “Findicator” and the “Welfare Compass”.

Findicator – Indicators for Social Progress (www.findikaattori.fi) is a joint initiative by Statistics Finland - the Finnish national statistical institute - and the Prime Minister’s Office, which was launched in 2009. Findicator is an Internet-service aimed at providing online access to indicators
and data considered as relevant and topical for measuring and monitoring social progress. Findicator allows access to about 100 social indicators, structured by 12 domains and presented in

Table 3.1.1: Social Monitoring Activities in Northern Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scandinavia</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td>Statistics Finland, Prime Minister's Office</td>
<td>Findicator - Indicators for Social Progress</td>
<td>2009</td>
<td>2013</td>
</tr>
<tr>
<td>Finland</td>
<td>National Institute for Health and Welfare</td>
<td>Welfare Compass</td>
<td>2012</td>
<td></td>
</tr>
<tr>
<td>Baltic States</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Latvia</td>
<td>Latvijas Statistica - Central Statistical Bureau</td>
<td>Key Indicators</td>
<td>1993</td>
<td>2013</td>
</tr>
<tr>
<td>Lithuania</td>
<td>Statistics Lithuania</td>
<td>Main indicators of economic and social development</td>
<td></td>
<td>2013</td>
</tr>
<tr>
<td>Lithuania</td>
<td>Statistics Lithuania</td>
<td>Quality of Life Indicators</td>
<td>2005</td>
<td>2011</td>
</tr>
</tbody>
</table>

three languages. In addition, a set of sustainable development indicators is also available. Following the Scandinavian tradition, Findicator is almost exclusively based on objective indicators and only includes very few subjective measures, such as “fear of crime”. The data are regularly updated and accessible in different formats (graphs, tables), which also allows comfortable further usage and manipulation of the data for different purposes. Findicator, moreover, provides access to the statistical databases behind the indicators and enables users to do their own calculations, although these possibilities are limited to rather simple analyzes of course. As a modern social monitoring instrument, Findicator may certainly be classified as an example of “good practice” in Europe.

The Welfare Compass (http://hyvinvointikompassi.thl.fi/en/web/hyvinvointikompassi/tietoapalvelusta), launched by the Finnish National Institute of Health and Welfare in 2012, is another more focused social monitoring tool, providing access to circa 100 key indicators for health, welfare, and social and health services. The data are presented at national, regional, and eventually also at municipal and hospital-district level. For selected indicators international comparative data

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7 See also Rosenström (2013)
are also available. The Welfare Compass project is not yet fully implemented and still under development.

The *Quality of Life Indicators* initiative launched by the Lithuanian national statistical institute ([http://web.stat.gov.lt/en](http://web.stat.gov.lt/en)) in 2011 turns out to be the most interesting social monitoring activity identified in the Baltic States. The set of 15 indicators, covering fields like income, housing, employment, health and education, have been selected by following the proposals of the European Statistical System’s Sponsorship Group “Measuring Progress, Well-being and Sustainable Development” (European Statistical System 2011). The current selection of indicators is supposed to be revised in the near future “in order to better implement quality-of-life measurement tasks: to provide policy-makers with information about what is making European citizens (un)happy, and, above all, what are the main differences between various social groups in terms of overall well-being (quality of life)” (see website).

Other monitoring activities in the Baltic states include the “Main Social and Economic Indicators” (Estonia, Lithuania), covering socio-economic, financial and macro-economic indicators, published quarterly by the National Statistical Institutes in these countries, as well as “Key Indicators”, regularly published by the Latvian National Statistical Institute since 1993. The latter monitoring activities are, however, primarily based on traditional economic and social statistics, and are thus only in a limited sense to be considered as tools qualified to measure and monitor well-being directly.

### 3.1.2 Social Reporting

Social reports have been published in the Nordic countries since the mid-1970s, and in the Baltic states only since the early 2000s. Table 3.1.2 provides an overview of currently existing as well as some previous social reporting activities in Northern Europe and lists their basic characteristics.

The Scandinavian countries – particularly Sweden, but also to some extent Finland – were not only among the forerunners in social reporting, but also had a strong influence on social reporting activities in other parts of Europe and beyond. The early Scandinavian social reporting activities were primarily characterized by: (1) a strong conceptual underpinning, (2) an explicit policy orientation, (3) the development of specialized welfare surveys to be used as databases for social reporting, and (4) the leading role of the National Statistical Institutes.  

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<table>
<thead>
<tr>
<th>Country</th>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
<th>Periodicity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scandinavia</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>Danmarks Statistics Socialforskningsinstituttet</td>
<td>Levevilkår i Danmark</td>
<td>1976</td>
<td>1999</td>
<td>4-5 yrs</td>
</tr>
<tr>
<td>Norway</td>
<td>Norges Offentlige Utredninger</td>
<td>Levekår i Norge. Er graset grønt for alle?</td>
<td>1993</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td>Statistics Norway</td>
<td>Social Trends 2000</td>
<td>2001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td>Statistics Norway</td>
<td>Sosial Utson/Social Survey</td>
<td>1974</td>
<td>2000</td>
<td>irregularly</td>
</tr>
<tr>
<td>Sweden</td>
<td>Statistika Centralbyran</td>
<td>Perspektiv på Välfärden</td>
<td>1982</td>
<td>2004</td>
<td></td>
</tr>
<tr>
<td><strong>Baltic States</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estonia</td>
<td>Fafo Norway, Tartu University, University of Latvia</td>
<td>Poverty in Estonia. Overview of main trends and patterns of poverty in the years 1996–2002</td>
<td>2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Latvia</td>
<td>Latvijas Statistica - Central Statistical Bureau</td>
<td>Material Deprivation of Latvia in 2011 (only in Latvian) 2012/02</td>
<td>2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lithuania</td>
<td>Statistics Lithuania</td>
<td>Economic and Social Development in Lithuania</td>
<td>2012</td>
<td></td>
<td>monthly</td>
</tr>
</tbody>
</table>

Conceptually, social reporting in the Scandinavian countries has been mainly driven and shaped by the so-called “level of living approach”, which proposes a notion of welfare or well-being as the “individual’s command over resources by the help of which one can control and purposely direct one’s living conditions” (Uusitalo 1994: 106) and thus gives strong priority to objective measures and indicators to be used in social reporting. An alternative notion of well-being proposed by the eminent Finnish sociologist Erik Allardt (1973), distinguishing three major dimensions of welfare – having, loving, and being – and also including subjective components, had only limited impact on institutionalized social reporting activities in the Nordic countries and elsewhere. The primary database – the “level of living survey” – which had been explicitly developed for social monitoring and reporting purposes, had its origin in a pioneering study at the Swedish Institute for Social Research and was directed by Sten Johansson, the later Director General of Statistics Sweden. In subsequent years, the “level of living surveys” were carried out by Statistics Sweden. Similar surveys were also organized in other Scandinavian countries, coordinated by the “Nordic Committee

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9 See also Johansson (1979)
for Surveys on Living Conditions”, and have been used not only for national social reports in these countries, but also for a supranational “Social Report for the Nordic Countries” (Vogel 1991).

The long tradition of social reporting in the Nordic countries, grounded in a well-institutionalized system of official data collection, is documented in a series of comprehensive and special social reports published since the 1970s, in their majority by the National Statistical Institutes (Table 3.1.2). In the meantime, however, some of these long-established reporting programs have been discontinued, such as Sosialt Utsyn (Norway, 1976-2000), Perspektiv på Vålfärden (Sweden, 1982-2004), Levevilkår i Danmark (Denmark, 1976-1999). The only comprehensive report in Scandinavia which is still regularly published is the Social Rapport/Social Report released by the National Board of Health and Welfare in Sweden. This report has a focus on social problems and particularly disadvantaged population groups and covers the following domains: migration, employment, poverty, health, elderly people and education. In 2010, the National Institute of Health and Welfare published a report on Welfare in Finland (available in Finnish only), which is the fourth report in an intermittent series.

Most of the Scandinavian reports mentioned are – due to the underlying “level of living” concept – similarly structured, covering a core set of life domains, and making primarily – if not exclusively – use of objective indicators. A common feature of social reporting in the Scandinavian countries is, moreover, the strong emphasis put on issues of equality or inequality.

Besides the long established and regularly published comprehensive reports, there are also a few one-time publications that should be considered social reports and which seem worth mentioning, such as Social Trends 2000, a publication from Statistics Norway. The report was published in the series “Statistical Analyses” and focuses on the state of and changes in the living conditions in Norway at the end of the 1990s. Another similar report is Levekår i Norge. Er graset grønt for alle? It was published in 1993 by the Norwegian administration services and provides an overview on living conditions in Norway, covering the domains of income, education and employment. It also provides information on the living conditions of specific groups within society, such as children, the elderly, immigrants and disabled people.

In the Baltic States, social reporting is actually not yet well developed, according to our inquiries. At present, Estonia turns out to be the only Baltic State where a comprehensive report – Sotsiaal-trendid / Social Trends (www.stat.ee/65394) – has been published regularly every third year by

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10 Possible reasons for this development will be discussed in chapter 4.
the National Statistical Institute since 1998. The report appears as a collection of individually authored articles, and each edition has a focus on varying specific themes.

The main topic of the 2013 report is “quality of life” and its measurement, while the previous report addressed “Population Ageing”. Depending on the topic, subjective measures are used more or less extensively. The “Social Trends” report also presents information on other EU countries and puts Estonia in a European context. It is a bilingual publication, in which each chapter appears in Estonian and English. Social Life in Figures 2007, also published by the Estonian Statistical Institute, is a one-time overview on social life in Estonia, covering seven life domains, among them education, employment and poverty.

There are also “Social Reports” in Latvia and Lithuania, published by governmental institutions, which – although they include empirical information on economic and social development – may eventually be better classified as social policy reports – concerned with issues of social security and social services – rather than social reports in the strict sense according to our criteria. Other reports to be mentioned are several publications focusing on poverty and material deprivation in Estonia and Latvia, published by the national statistical institutes and - in the Estonian case - also by research institutes. Going beyond financial poverty only, these reports address aspects such as the quality of housing and more general issues of social inclusion. A report published by the Estonian Statistical Institute – Vaesus Eestis / Poverty in Estonia – also addresses subjective manifestations of poverty.

3.1.3 Sustainable Development

Each northern European country publishes sustainable development reports as well as sets of indicators based on the national strategies for sustainable development. All these activities address issues related to the three dimensions of sustainability – environment, economy, and the social dimension – and present information on the economic, environmental and social development in the country. The only exception is the sustainable development strategy of Iceland, which focuses on environmental issues exclusively. Similarly, each of the Baltic States has launched a sustainable development strategy. While related monitoring instruments (sustainability indicators) and sustainable development reports have existed in Estonia and Lithuania since the early 2000s, it seems as if respective activities have not yet been launched in Latvia.
In addition to the country-specific activities, the Nordic Council of Ministers has been an active player in this field as well, e.g. proposing the Sustainable Nordic Welfare Programme (www.norden.org/en/theme/haallbar-nordisk-vaelfaerd). Most interesting are two recent reports published by the council. The first report on *A Good Life in a Sustainable Nordic Region* (Nordic Council of Ministers 2013a) presents a new version of a Nordic Strategy for Sustainable Development, which is supposed to provide a framework and guidelines for years to come. The notion of sustainable development proposed covers economic, environmental and social dimensions, and puts a special emphasis on the sustainability of the Nordic welfare model. Increasing welfare and improving quality of life for current and future generations are thus core development goals. The second report presents a set of *Nordic Sustainable Development Indicators* and related data, putting the Nordic countries (as well as the EU27) into comparison (Nordic Council of Ministers 2013b). *Nordic Sustainable Development Indicator Reports* have been published by the Nordic Council of Ministers regularly since 2009.

### 3.2 Western and Central Europe

The countries to be covered by this section include Austria, Belgium, France, Germany, Ireland, Luxembourg, the Netherlands, Switzerland, and the United Kingdom. While social monitoring and reporting activities were established in some of these countries early on, activities of this sort are still lacking in a few others. Overall however, this part of Europe is characterized by an abundance of social monitoring and reporting activities, but also by a considerable degree of heterogeneity in this matter.

#### 3.2.1 Social Monitoring

Social monitoring activities using sets of indicators and/or composite indices are to be found in a range of Western and Central European countries. Most of them are obviously more recent initiatives. As it seems, concept driven approaches of measuring and monitoring well-being, like systems of social indicators, are rather rare, although many of the existing monitoring activities have been initiated by research institutes. On the other hand social monitoring activities initiated by statistical institutes, governmental agencies or non-profit institutions appear to be more policy
driven. As it seems, composite index approaches have been launched primarily by non-profit institutions up to now. Geographically, social monitoring activities currently seem to be concentrated in a few countries, e.g. Germany, the Netherlands and the United Kingdom.

Table 3.2.1 presents an overview of major social monitoring activities currently existing in Western and Central European Countries.

<table>
<thead>
<tr>
<th>Country</th>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>BMASK, Federal Ministry of Labour, Social Affairs and Consumer Protection</td>
<td>Sozialpolitische Indikatoren im internationalen Vergleich</td>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>Austria</td>
<td>Statistics Austria</td>
<td>How's Austria?</td>
<td>2012</td>
<td>2012</td>
</tr>
<tr>
<td>Belgium</td>
<td>Herman Deleeck Centre for Social Policy, University of Antwerp</td>
<td>Indicatoren</td>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>Institut National de la Statistique et des Études Économiques</td>
<td>Indicateurs d'inégalités sociales</td>
<td>2007</td>
<td>2012</td>
</tr>
<tr>
<td>Germany</td>
<td>Social Indicators Research Centre (ZSi)</td>
<td>German System of Social Indicators</td>
<td>1977</td>
<td>2013</td>
</tr>
<tr>
<td>Germany</td>
<td>Federal Environmental Agency</td>
<td>Measuring welfare in Germany - A suggestion for a new welfare index</td>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>Denkwerk Zukunft - Foundation for Cultural Renewal</td>
<td>Prosperity Quintet</td>
<td>2013</td>
<td>2014</td>
</tr>
<tr>
<td>Netherlands</td>
<td>Social and Cultural Planning Office - SCP</td>
<td>Life Situation Index</td>
<td>2001</td>
<td>2009</td>
</tr>
<tr>
<td>Netherlands</td>
<td>Statistics Netherlands</td>
<td>Personal Well-Being Index for the Netherlands</td>
<td>2005</td>
<td>2010</td>
</tr>
<tr>
<td>Switzerland</td>
<td>Swiss Federal Statistical Office</td>
<td>GDP and beyond - Indicators</td>
<td>2012</td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td>Swiss Federal Statistical Office (FSO), et al.</td>
<td>MONET: sustainable development indicators</td>
<td>2003</td>
<td>2013</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Oxfam</td>
<td>Humankind Index - the new measure of Scotland's prosperity</td>
<td>2007-2008</td>
<td>2013</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Scotland Performs, National Performance Framework</td>
<td>National Indicators</td>
<td>2007</td>
<td>2011</td>
</tr>
</tbody>
</table>
While the majority of social monitoring activities in Western and Central European countries have been launched more recently, the German System of Social Indicators was developed as early as in the 1970s as a manifestation of the social indicators movement, by then a booming development. Following a concept-driven approach, the German System of Social Indicators has been developed with a view to comprehensively monitoring well-being - in terms of objective living conditions as well as subjective quality of life - and social change in Germany (Noll 2014). Covering 14 life domains, the system includes almost 400 indicators with a total of more than 3000 time-series. Among the total number of indicators, circa 90 are flagged as “key indicators”. The period of observation starts at the beginning of the 1950’s and covers the entire time span up to the present. Since most of the times series data are disaggregated according to various socio-demographic characteristics, the indicator system also offers information on the social situation of specific subgroups of the population as well as on the inequality of living conditions in general. The German System of Social Indicators is hosted as well as continuously updated and maintained by the Social Indicators Research Centre at GESIS - Leibniz Institute for the Social Sciences. Since 2010 the time series data from this indicator system are accessible online through the Social Indicators Monitor – SIMon (www.gesis.org/simon).

More recent examples of monitoring instruments in terms of sets of well-being indicators include the Measuring National Well-being (MNW) program in the UK as well as the National Indicators and Performance Framework launched by Scotland Performs, a governmental initiative.

The Measuring National Well-being program “Measuring What Matters” (www.ons.gov.uk/ons/guide-method/user-guidance/well-being/index.html), launched by the Office of National Statistics of the United Kingdom in 2010, is aimed at “developing and publishing an accepted and trusted set of National Statistics which help people understand and monitor well-being” (see website). At the centre of the MNW program are headline indicators in areas such as health, relationships, job satisfaction, economic security, education, environmental conditions and subjective measures of “personal well-being”. The monitoring part of the program includes a “National Well-being Wheel of Measures”, an interactive web tool, which allows indicators related to various domains of life to be selected and the statistical information to be displayed in different ways.
The MNW program also includes a social report titled “Life in the UK”, first published in 2012, that provides an overview of well-being in the UK today. The report covers a range of life domains and is scheduled to be published annually. The domains covered are: personal well-being, our relations, health, what we do, where we live, personal finance, the economy, education and skills, governance, and the natural environment.

Another indicator set, which is meant to measure and monitor social progress rather comprehensively, is the National Indicators initiative, released by the National Performance Framework Scotland Performs in 2007 and which has been refreshed in 2011. This monitoring instrument makes use of 45 indicators and seeks to monitor the achievement of goals such as sustainable growth and a better, healthier and fairer society in Scotland. It covers the dimensions of economic growth, productivity, participation, population, solidarity, cohesion, and sustainability. The website provides comfortable access to the indicators, which are organized according to the performance goals, and related statistical information. For each indicator answers are given to the following four questions: (1) Why is this National Indicator important? (2) What will influence this National Indicator? (3) What is the government’s role? (4) How are we performing? (www.scotland.gov.uk/About/Performance/scotPerforms/indicators)

The Deleeck Centre’s Indicatoren or the selection of Indicateurs d’inégalités sociales by the French National Statistical Institute are examples of indicator sets, which in their thematic scope are more limited. The set of indicators– Indicatoren - presented by the Herman Deleeck Centre in Belgium is limited to social policy domains, such as population, employment, poverty, health, housing, education, and social security, which are particularly relevant from a welfare state perspective. The focus is clearly on objective measures. The time series data cover Belgium, but eventually also a range of other European or OECD countries. The set Indicateurs d’inégalités sociales, published by INSEE since 2007, reveals itself to be an even more thematically focused selection of indicators, meant to measure inequality in the areas of employment, education, housing, health, and income.

Although quite a number of new composite well-being indices have been released in recent years in Western and Central European countries, there is at least one composite well-being index – the Life Situation Index published by the Netherlands Institute for Social Research (SCP) – which has been regularly published for over a decade, with the data even available for the whole time span since 1974 (Boelhouwer 2010). The SCP Life Situation Index is a composite index constructed with a view to measuring and monitoring the progress of Dutch society based on a set of indicators.
that clearly extend beyond merely measuring economic growth. The Index incorporates indicators for eight domains of life: health, sport, social participation (loneliness, volunteering), cultural/leisure activities, housing, mobility, holidays and possession of assets. The results of the Life Situation Index are regularly published in the Dutch social report “The Social State of the Netherlands” (see below).

More recently launched composite index approaches, which in their majority are driven by the Beyond-GDP movement, include the *Humankind Index*, published by OXFAM in the United Kingdom, a *Welfare Index for Germany*, proposed by the Federal Environment Agency, as well as the *Prosperity Quintet* launched by the German think tank Denkwerk Zukunft in 2010. The latter is not a composite index in a strict sense, but rather an approach employing only five key indicators, which are meant to measure and monitor economic, social and environmental dimensions of prosperity, but are not combined in a composite measure. The quintet of indicators includes: GDP per capita, distribution of disposable income based on the 80/20 ratio, the social exclusion rate, the ecological footprint, and the public debt rate (Wahl/Schulte/Butzmann 2011).

### 3.2.2 Social Reporting

In most of the countries looked at in this section, social reports in some way or the other are regularly published, as can be seen from table 3.2.2. While some of the reports were published as early as in the 1970s, others followed in later decades. France, Germany, the Netherlands and the UK, on the other hand, turn out to be countries where a long tradition of social reporting exists.

The British *Social Trends* (1970), the French report *Données Sociales* (1973), and the Dutch *Social and Cultural Report* (1974) number among the first comprehensive social reports ever launched. While the British and French reports were published by national statistical institutes, the Dutch report is published by the Social and Cultural Planning office, a governmental planning and research institute, now called “The Netherlands Institute for Social Research”. All three reports have been published regularly for several decades, but unfortunately the British Social Trends as well as the French *Données Sociales* have been discontinued recently, at least as print editions. The latest printed version of Social Trends appeared in 2010. This long-standing report has been replaced by *Measuring National Well-Being – Life in the UK*11, which appeared in its first edition in 2012 and is going to be published annually by the British Office for National Statistics. *Données Sociales* was discontinued after the publication of the 2006 report. The Dutch *Social and Cultural Report* is still being published regularly but has changed its structure and thematic focus slightly. Other reports

11 See also the previous section on “social monitoring”.

Deliverable 5.2 39/79 March 2014
Table 3.2.2: Social Reporting Activities in Central & Western Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
<th>Periodicity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>OASSeS, Centre on Inequality, Poverty, Social Exclusion and the City, University of Antwerp</td>
<td>Rapport - Armoedebarometer 2012</td>
<td>2010</td>
<td>2012</td>
<td>annually</td>
</tr>
<tr>
<td>France</td>
<td>Institut National de la Statistique et des Études Économiques</td>
<td>Données Sociales</td>
<td>1973</td>
<td>2006</td>
<td>3 yrs</td>
</tr>
<tr>
<td>France</td>
<td>Institut National de la Statistique et des Études Économiques</td>
<td>Portrait Social</td>
<td>1997</td>
<td>2012</td>
<td>annually</td>
</tr>
<tr>
<td>Germany</td>
<td>Federal Statistical Office Germany (destatis) with WZB and ZSi (until 2008)</td>
<td>Datenreport</td>
<td>1983</td>
<td>2013</td>
<td>2 yrs</td>
</tr>
<tr>
<td>Germany</td>
<td>Federal Ministry of Labour and Social Affairs</td>
<td>Lebenslagen in Deutschland, Armuts- und Reichtumsbericht der Bundesregierung - The German Federal Government's Report on Poverty and Wealth (with summary in english)</td>
<td>2001</td>
<td>2013</td>
<td>3-5 yrs</td>
</tr>
<tr>
<td>Ireland</td>
<td>Central Statistics Office Ireland</td>
<td>Measuring Ireland’s Progress</td>
<td>2003</td>
<td>2011</td>
<td>annually</td>
</tr>
<tr>
<td>Ireland</td>
<td>National Economic and Social Council (NESC)</td>
<td>Well-being Matters: A Social Report for Ireland</td>
<td>2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luxembourg</td>
<td>Service Central de la statistique et des études économiques - STATEC</td>
<td>Portrait économique et sociale du Luxembourg/Economic and social portrait of Luxembourg</td>
<td>2003</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>CBS/SCP</td>
<td>Armoedebaricht</td>
<td>2002</td>
<td>2008</td>
<td>2-4 yrs</td>
</tr>
<tr>
<td>Netherlands</td>
<td>CBS/SCP</td>
<td>Armoedemonitor (Poverty monitor)</td>
<td>1997</td>
<td>2007</td>
<td>2 yrs</td>
</tr>
<tr>
<td>Netherlands</td>
<td>Social and Cultural Planning Office - SCP</td>
<td>De sociale staat van de Nederland</td>
<td>2001</td>
<td>2011</td>
<td>2 yrs</td>
</tr>
<tr>
<td>Switzerland</td>
<td>FORS and varying editors</td>
<td>Sozialbericht</td>
<td>2000</td>
<td>2012</td>
<td>4 yrs</td>
</tr>
<tr>
<td>Switzerland</td>
<td>Swiss Federal Statistical Office</td>
<td>Statistischer Sozialbericht</td>
<td>2011</td>
<td></td>
<td>once each legislative</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Office for National Statistics UK</td>
<td>Social Trends</td>
<td>1970</td>
<td>2012*</td>
<td>annually</td>
</tr>
</tbody>
</table>

* last print edition in 2010
have been released in France as well as in the Netherlands, which to some extent have replaced the more traditional reports in their previous functions: the annual *Portrait Social* report in France, published since 1997, and *De Sociale Staat* in the Netherlands, published since 2001.

“De Sociale Staat van de Nederland” – in English “The Social State of the Netherlands” – ([www.scp.nl/Publicaties/Terugkerende_monitors_en_reeksen/De_sociale_staat_van_Nederland](http://www.scp.nl/Publicaties/Terugkerende_monitors_en_reeksen/De_sociale_staat_van_Nederland)) presents a systematic overview of the quality of life and living conditions of the Dutch population. The report provides quantitative information and analysis on the life situation across various domains, such as income, work, education, health, crime, housing, participation and leisure and covers material and non-material aspects of the life situation as well as subjective perceptions and evaluations. The detailed information is synthesized by a composite index, the Netherlands’ “Life Situation Index” (see above). The report was launched in 2001 and has been published every two years since then.

As the most popular German social report, the *Datenreport* (Data Report) presents results on the social situation and changes in living conditions and the quality of life in Germany. The biannual report is the result of a collaboration between the German Statistical Office (destatis) and social research institutes (Berlin Social Science Center, GESIS until 2008) and was published for the first time in 1983. It is widely circulated by the Federal Agency for Political Education. The report is structured by life domains and presents chapters based on data from official statistics as well as research-driven surveys for each of the domains. From its beginnings in the mid-1980s, the *Datenreport* has put a special emphasis on subjective quality of life issues, using data for example on life satisfaction and satisfaction with various life domains, which have been collected in Germany via research-driven surveys (Welfare Survey; Socio Economic Household Panel) regularly since the late 1970s.

Other regularly published social reports, which have been launched more recently, include reports in Switzerland and Ireland. The Swiss *Social Report* is a science-based report, hosted by the Swiss Foundation for Research in the Social Sciences. Each issue has several individual editors, among them prominent Swiss researchers. The Swiss Social Report ([www.socialreport.ch](http://www.socialreport.ch)) seeks to inform policy makers and other experts as well as the general public about the current status of and development trends in the Swiss society. The report was launched in 2000 and is published every four years. The most recent report was published in 2012. The report is structured around five basic dimensions of the organization of societies: distribution of social goods, cultural diver-
sity, social integration, political embodiment, society and environment. Based on a selection of circa 70 indicators, the report presents analytical descriptions of the current situation and development trends for each of the five domains. Complimentary in-depth analytical contributions are focused on different aspects of varying special themes addressed in each of the reports. The Swiss report is a typical example of a science-based or research-driven social report, characterized by high degrees of analytical rigor and depth. The Swiss Social Report is available in French, German and English.

In 2011 a second Swiss social report - Statistischer Sozialbericht (Statistical Social Report) was published for the first time by the Swiss national statistical institute. As an official publication of the Swiss Federal Council, this report is much more policy driven, covering issues like the macroeconomic context, the socioeconomic situation of the population, social security and social exclusion.

Ireland too has seen interesting and promising new social reporting initiatives in recent years. The annual report Measuring Ireland’s Progress, published by Ireland’s Central Statistical Office, presents a range of indicators, structured by 10 domains and 49 sub-domains, which are supposed to monitor progress in the economic, social and environmental situation of the country. A first preliminary set of national progress indicators was published in December 2003. Since then the report Measuring Ireland’s Progress has been published annually and the 2012 edition, published online only, is the tenth in the series. Most indicators are presented in both a national and an international context. The Measuring Ireland’s Progress Report is complemented by two other indicator reports, the report Our Sustainable Future, A Framework for Sustainable Development for Ireland and Environmental Indicators Ireland. A second – most interesting – Irish social report has been released by the National Economic and Social Council in 2009: Well-being Matters: A Social Report for Ireland. Compared to Measuring Ireland’s Progress, this report is more explicitly embedded in a conceptual framework, including theoretical considerations on the links between policy making and well-being measurement and social reporting. As an overall aim, the report seeks “to analyse and interpret key social trends to inform social policy and well-being” (Well-being Matters: A Social Report for Ireland, Volume II, p. 51). The two volume report comprises the following parts (see volume II, p. xviii):

Part I, Thinking about Well-being (explaining why well-being matters; reviewing the well-being literature to arrive at an understanding of well-being, which is used throughout the report.
Part II, *Reporting Well-being* (expressing well-being through social reporting; overview of well-being trends in Ireland over the last ten to twenty years).

Part III, *Recasting Well-being in Ireland*: summarizes the key wellbeing trends, sets out the wellbeing implications and suggests a number of policy directions.

Part IV, *Charting Well-being in the Policy Framework*: each of the chapters relating to a life cycle stage as set out in the policy framework document *Towards 2016*: children, people of working age, older people and people with disabilities. Each of the four chapters explores meanings of well-being in relation to the particular population group, documents key well-being trends, relates these to the policy framework and comments on policy directions, data and indicator gaps.

Up to the present, the report *Well-being Matters* has been published only once. Information on whether or not the report will be published in future years is currently not available.

There are more social reports in other countries, which have been published only once, as for example the report *Déchiffrer la Société Française* published by the independent French journalist Louis Maurin, founder of the *Centre d’observation de la société*. In some of the countries, e.g. Belgium, Germany, the Netherlands, poverty reports are also published regularly, which sometimes go well beyond reporting on financial poverty only. A good example is the *Poverty and Wealth Report*, published by the German Federal Government every three to five years, which has a broad scope, also addressing issues like educational inequalities or social mobility, and varying special topics for each edition. The report receives enormous public attention and plays an important role in the political debate as well.

### 3.2.3 Sustainable Development

Strategies for sustainable development have been defined in every Central and Western European country, which are usually accompanied by monitoring and reporting activities. As a federal state, Belgium has agreed on a Federal Strategy for Sustainable Development as well as regional strategies for Sustainable Development, rather than a truly national strategy. Sustainable development reports and/or sustainable development indicators are available for each of the countries considered, addressing all three dimensions of sustainability – economy, environment and social cohesion. In the majority of cases, these reports and indicators are published by governmental institutions and national statistical institutes. For example, in Germany, the Federal Statistical Office publishes an “indicator report” on “Sustainable Development in Germany” every two years.
Issues of monitoring and reporting on sustainable development have also been assumed by various research institutes and/or NGOs, as, for example, the Sustainable Society Foundation, which has a global reach, but is located in the Netherlands. The main purpose of this non-profit organization is to assist societies in their development towards sustainability. It is involved in various fields of promoting sustainability and has developed the Sustainable Society Index for 151 countries. Also the Belgian project WellBeBe - Toward theoretically sound and democratically legitimate indicators of well-being in Belgium deserves being mentioned in this context. The aim of this project is the elaboration of an index of well-being in Belgium. By rethinking well-being, notably by de-linking it as far as possible from production and consumption growth, it is intended to contribute to a sustainable development policy. The project, launched in 2007 and funded under the “Science for a Sustainable Development Research Programme” was carried out by the “Institut pour un Développement Durable”, the “Centre d'Etudes du Développement Durable de l’Université Libre de Bruxelles”, and the Higher Institute of Labour Studies of the University of Leuven. Beyond indicator selection and development, the project’s aims also included promoting a democratic and participative transition towards more sustainability in the quality of life.

The Sustainability Monitor for the Netherlands is another monitoring instrument which deserves being emphasized. It was launched in 2011 by the Dutch Central Bureau of Statistics in collaboration with the Netherlands Institute for Social Research, the Netherlands Environmental Assessment Agency and the Netherlands Bureau for Economic Policy Analysis. The monitor is supposed to show where the Netherlands is doing well from the point of view of sustainable development and where there is a motive for concern. The Sustainability Monitor is based on a rather broad notion of sustainability, which centers around three basic goals: “guaranteeing a sufficient quality of life (1), that is not at the expense of the ability of future generations to meet their needs (2), and that does not have a detrimental effect on the quality of life in other countries” (p. 7). This notion of sustainability goes well beyond the usual understanding and comes close to the more general notion of well-being, and thus may blur the boundaries between those concepts.

The Sustainability Monitor - MONET published and maintained by the Swiss Federal Statistical Office, in collaboration with the Federal Office for the Environment (FOEN), the Federal Office for Spatial Development (ARE), and the Swiss Agency for Development and Cooperation (SDC), is another example of “good practice” as far as the monitoring of sustainable development is con-
cerned. The *Sustainability Monitor – MONET*, which addresses dimensions of environmental, social and economic sustainability, makes use of 76 indicators, 14 of these flagged as key indicators. The MONET website allows the display and export of the time series data and offers additional information, e.g. comments on the trends as well as assessments of the development (positive, negative, neutral) for each indicator ([www.bfs.admin.ch/bfs/portal/de/index/themen/21/02/ind32.approach.3201.html](http://www.bfs.admin.ch/bfs/portal/de/index/themen/21/02/ind32.approach.3201.html)).

### 3.3 Eastern Europe

Social reports and social monitoring instruments in a strict sense did not exist during the socialist period in the eastern part of Europe. Although social indicators research attracted some interest in some research institutes and academies of social science in those countries, e.g. in the German Democratic Republic or the Soviet Union, governments did not allow any public social reporting and social monitoring activities. The few activities that were carried out during this period were highly influenced by the ideology of the political system and were not accessible to the public. In other words, these activities did not meet the criteria of social monitoring and reporting activities in a general sense. Today we find such activities in one way or the other in almost all of these countries. Obviously, the development of social monitoring and reporting activities in Eastern European nations was stimulated and supported by the processes of political liberalization and the transition to market economies, but until now, not as many regularly published reports or elaborated monitoring instruments exist as in other parts of Europe. In the following we will provide an overview of the most relevant publications and initiatives, structured by type of activity.

#### 3.3.1 Social Monitoring Activities

Currently, there are only few regular social monitoring activities to be found in Eastern European countries. Most of them seem to be more pragmatically selected sets of indicators rather than theoretically grounded and systematically elaborated indicator systems. Interestingly, all the existing social monitoring activities that have been identified are located in the Czech Republic (table 3.3.1).

The *Indicators of Social and Economic Development of the Czech Republic* have been regularly published by the Czech Statistical Office since 1990. The Research Institute for Labour and Social Affairs – RILSA publishes a set of *Economic and Social Indicators of the Czech Republic* since 2003.
More recently, in 2011, also the Ministry of Labour and Social Affairs has launched a set of Basic Indicators of Living Standard in the Czech Republic, which covers the period from 1993 to 2006.

Table 3.3.1: Social Monitoring Activities in Eastern Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Czech Republic</td>
<td>Czech Statistical Office</td>
<td>Indicators of Social and Economic Development of the Czech Republic</td>
<td>1990</td>
<td>2012</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>Ministry of Labour and Social Affairs</td>
<td>Basic Indicators of Living Standard in the Czech Republic in the Years 1993-2006</td>
<td>2011</td>
<td></td>
</tr>
<tr>
<td>Czech Republic</td>
<td>Research Institute for Labour and Social Affairs - RILSA</td>
<td>Economic and Social Indicators of the Czech Republic</td>
<td>2003</td>
<td>2012</td>
</tr>
</tbody>
</table>

3.3.2 Social Reporting Activities

Although Eastern European countries are – due to their past as socialist societies – among the latecomers in social reporting, in most of these countries social reporting activities emerged after the system change, although in different manners and formats. While the political transition obviously prepared the ground for the development of new social reporting and monitoring initiatives in Eastern Europe, the initiatives have been successful in most of the countries, resulting in regularly published comprehensive social reports, but not in all of them. Romania, where we did not find any comprehensive social report in a strict sense, seems to be an example of the latter. Most of the social reporting activities in Eastern European countries were launched in the late 1990s or early 2000s, typically initiated by and under the responsibility of research institutes. While regularly published comprehensive social reports still exist in only a few countries, several one-time reports have been published, most of them placing special focus on the particularities of the period of transition from socialist to post-socialist societies. As it seems, social reports published in Eastern European countries generally put a stronger emphasis on the material living conditions and the use of objective measures, although issues of subjective well-being are sometimes also addressed. Table 3.3.2 provides an overview of the existing comprehensive reports in Eastern European countries and their main characteristics.
The Hungarian Social Report was among the first social reports ever published in a post-socialist Eastern European country. It was launched in 1990 and has been published every second year since by TÁRKI, a Hungarian social research institute and think tank. Some of the reports have also been published in English language editions. The list of editors of the research driven Hungarian Social Report includes eminent scholars such as Rudolf Andorka, Tamás Kolosi and others. According to the editors of the first edition, the aim of the Social Report was to give a picture of the Hungarian society as complete as possible.

The Hungarian Social Report is set up as a collection of analytical chapters covering several domains and addressing specific issues and problems. It is structured into several sections, addressing for example issues like inequality, consumption or subjective perceptions of the social situa-

Other comprehensive social reports published on a regular basis exist in Slovakia and Poland. In Slovakia social reports have been published by the National Statistical Institute as well as by a research institute.

The publication Slovakia - A Global Report on the State of Society was launched for the first time in 1997 by the Institute for Public Affairs (IVO), an independent non-governmental, nonprofit organization. The report has been published annually since then and strives to present a diagnosis of the state and changing trends in Slovak society, as well as to identify “alternatives of future development in various areas of its life”. The 2006 report is also available in English (www.ivo.sk/4910/en/books/slovakia-2006-a-global-report-on-the-state-of-society?lang=EN).

Since 2009 the Statistical Office of the Slovak Republic has published the annual report Social Development Trends in the Slovak Republic (http://portal.statistics.sk/showdoc.do?docid=73861). Based on indicators and time series data, this report presents analytical comments addressing a wide range of life domains, such as demography, labor market, incomes and expenditures, social protection, health, education, culture, religion, crime, justice and social participation.

Social Diagnosis is a comprehensive Polish social report which was launched for the first time in 2003 and has been regularly published by "The Council for Social Monitoring" since then (www.diagnoza.com/index-en.html). A second edition appeared in 2007, the most recent one in 2013. Social Diagnosis is a social report explicitly focusing on issues of the objective and subjective quality of life in Poland. The report is thus supposed to provide a detailed description and analysis of objective living conditions as well as of the perceived quality of life of the Polish population. Since 2007 the report is published every two years and appears as a special issue of the journal "Contemporary Economics". Social Diagnosis covers material (income, material wealth, savings and financing) as well as immaterial (e.g. education, medical care, stress, psychological well-being, lifestyle, pathologies, engagement in the arts and cultural events) components of well-being. In addition, some editions of the report also include special chapters on the state of the civil society, on the use of information and communication technologies and on social exclusion. This concept and research-driven report is based on panel data from a survey on the "conditions and quality of life in Poland"
and does not only seek to assess the current life situation, but also aims to identify and chart changes in the quality of life in Poland across time by way of longitudinal analysis.

In addition to these regularly published reports there are also “one-time” special reports available in a few countries, which come close to social reports, but are not supposed to be published repeatedly. Several of these reports put a special focus on the social consequences of the political and economic transition in these countries, particularly in terms of people's living conditions and social progress (Hungary. Change of Course – Hungary 1990-2004; Czech Society after 1989). These special reports usually have a strong focus on the decade after the change in the political system, addressing issues of social inequality, of the social and political structures and material well-being. Also subjective issues, such as perceived life chances, are sometimes addressed.

Another type of one-time report is The Social Report: Poland 2005, published by the Friedrich Ebert Foundation in 2005, which was intended to initiate a discussion on Poland's future. The general aim of the report was “to present a picture that, although simplified, is justly comprehensive. Thereafter, on the basis of this picture, we attempt to assess the present social situation” (p. 140). The Polish Social Report delineates and analyzes the key social problems and related social policies in Poland since the communist period till the mid-2000s. The report covers several domains such as the demographic situation, health care, the labor market and social protection. Subjective dimensions and measures are included in terms of values and attitudes. A final chapter presents a summary view of Polish society 15 years after the transition. Although further editions of the Social Report had been envisaged, the report Poland 2005 turns out to be the only one which has been published until today.

3.3.3 Sustainable Development

Activities aimed at monitoring and reporting on sustainable development exist in each of the Eastern European countries, though in different formats and intensity. Most of the activities have been launched within the recent last few years, that is, 2007 or later, and cover the three basic dimensions of sustainability – economic, environmental and social sustainability. The activities – usually based on national sustainable development strategies – include sets of sustainable development indicators (Bulgaria, Hungary, Poland, Romania, Slovakia) as well as sustainable development reports (Bulgaria, Czech Republic).

A project in Romania, which ran from 2007 to 2009, was aimed at constructing a tailor-made Sustainable Society Index for this country (www.romaniadurabila.net/home-en.htm). This composite
index, based on a set of 22 sustainable development indicators suggested by the Sustainable Society Foundation as well as of five additional indicators, taking into account the particularities of Romania, was launched in 2008 for the first time. In subsequent years a modified, regionally disaggregated index has also been published.

3.4 Southern Europe

Although Southern European countries in their majority are among the latecomers in terms of social monitoring and reporting activities, there are also some exceptions. Italy in particular can look back on a long tradition of social reporting: The publication “Rapporto Sulla Situazione Sociale del Paese” (*Italy Today. Social Picture and Trends*) is a report, published annually by the research institute CENSIS (Centro Studi Investimenti Sociali) since 1967, and thus turns out to be globally one of the earliest and long-lasting social reports. Other nations in the “core” of southern Europe as well as in the eastern part engaged much later in social monitoring and reporting activities, some of them not before the political transition in the former socialist societies or even the turn of the century. The eastern part of Southern Europe, moreover, belongs to the few European regions where some blind spots are still left, and where up to now comprehensive social reports have not been published nor regular social monitoring activities exist, leaving aside more general statistical compendia published by the National Statistical Institutes in these countries.

Because of the historically-grounded differences in the traditions of social monitoring and reporting, this section will distinguish between a set of core southern or Mediterranean European countries, consisting of Cyprus, Greece, Italy, Malta, Portugal and Spain on the one hand, and the south-eastern part of Europe, including Albania and the successor states of the former Yugoslavia, on the other.

3.4.1 Social Monitoring

To our knowledge, social monitoring activities do exist in some, but not in all of the southern European countries. Table 3.4.1 provides an overview of the currently existing social monitoring activities in southern Europe, most of them based on sets of indicators, but some of them also making use of composite index approaches.
Table 3.4.1: Social Monitoring Activities in Southern Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Southern Europe</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cyprus</td>
<td>Statistical Service of Cyprus</td>
<td>Structural Indicators (Lisbon Strategy)</td>
<td>2006</td>
<td>2010</td>
</tr>
<tr>
<td>Greece</td>
<td>Hellenic Statistical Authority</td>
<td>Living Conditions in Greece</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Italy</td>
<td>Joint National Council for Economics and Labour (CNEL)/Italian National Institute of Statistics (ISTAT)</td>
<td>'bes - Equitable and Sustainable Wellbeing in Italy'</td>
<td></td>
<td>2013</td>
</tr>
<tr>
<td>Italy</td>
<td>Instituto Nazionale di Statistica</td>
<td>Territorial Indicators</td>
<td>1998</td>
<td>2011</td>
</tr>
<tr>
<td>Portugal</td>
<td>Instituto Nacional de Estadística</td>
<td>Indicadores Sociais</td>
<td>1999</td>
<td>2011</td>
</tr>
<tr>
<td>Spain</td>
<td>Colectivo Ioé/Centro de Investigación para la Paz-Peace Research Center (CIP-Ecosocial)</td>
<td>Barometro Social de España</td>
<td>2006</td>
<td>2010</td>
</tr>
<tr>
<td>Spain</td>
<td>Instituto Nacional de Estadística</td>
<td>Indicadores Sociales</td>
<td>1991</td>
<td>2011</td>
</tr>
<tr>
<td>Spain</td>
<td>Bericat/Camarero (Andalusian Statistic Institute, University of Seville)</td>
<td>La calidad social en Andalucia, España y Europa - un sistema de indicadores</td>
<td></td>
<td>2011</td>
</tr>
<tr>
<td><strong>South-Eastern Europe</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Slovenia</td>
<td>IMAD - Institute of Macroeconomic Analysis and Development</td>
<td>Indicators for monitoring development goals</td>
<td>2002</td>
<td></td>
</tr>
</tbody>
</table>

Social monitoring activities in Southern Europe go back to the early 1990s, most of them initiated by the National Statistical Institutes. In 1991, the Spanish Statistical Institute INE launched *Indicadores Sociales*, a set of social indicators supposed to monitor changes in living conditions in Spain. In 1999, the Portuguese Statistical Institute published for the first time *Indicadores Sociais*, likewise a set of social indicators aimed at monitoring the living conditions of the population and the social situation in the country. Both sets of indicators cover a range of life domains, but were restricted to objective indicators only. Since 2006 Statistics Portugal has also annually published “The People”, which is a bilingual pocket book (Portuguese/English) rather than a social report in a strict sense, containing indicators and data on living conditions in various life domains. In Italy, a monitoring activity called *Territorial Indicators* was launched by ISTAT in 1998, covering a set of
demographic, social, environmental and economic indicators at national and sub-national level (capitals, provinces, regions, geographical areas). The (objective) indicators are grouped into 16 domains, covering economic as well as social issues: prices, national accounts, agriculture, environment, industry, housing, construction and public works, external trade, transport and tourism, labor market, household budget, households and social aspects, population, public health, welfare services and social securities, education, culture and leisure, justice, sustainable development. The time series database is accessible online: http://sitis.istat.it/sitis/html/indexEng.htm.

More recently (2012), the official Hellenic Statistical Authority launched the Living Conditions in Greece (www.statistics.gr/portal/page/portal/ESYE/PAGE-livingcond), a publication covering several domains and presenting social indicators and time series data as tables and charts. The data provided are supposed to be used for monitoring the quality of life in a broad sense, including poverty and social inclusion. The bilingual (Greek, English) publication is published annually, but updated several times a year.

The Structural Indicators published by the Cyprian national statistical institute since 2006 have been compiled in the framework of the Lisbon Strategy, the EU development plan for 2000 –2010. Indicators cover the following domains: general economic background, employment, innovation and research, economic reform, social cohesion and environment.

Three other social monitoring activities, two in Spain and one in Italy, deserve being presented in some more detail: The Barometro Social de Espana, “La calidad social en Andalucía, España y Europa - un sistema de indicadores” and the Benessere Equo e Sostenibile (BES) initiative in Italy.

The Barometro Social de Espana (www.barometrosocial.es) is a system of social indicators, launched in 2006 and developed by the Colectivo Ioé, a private social research institute. The social barometer is based on a system of social indicators and composite indices aimed at a continuous monitoring and assessment of the social situation in Spain. The indicator system includes about 180 indicators corresponding to 34 dimensions in 11 domains or “social spheres”, like income and wealth, employment, health, education, housing, social protection, public safety, environment, and social participation. In addition to the single indicators, the social barometer also includes various composite indices: one global index of social well-being, three global sub-indices, eleven indices for each domain and 34 for each dimension. Indices at the domain level are, for example, the Poverty Index (Income and Wealth), the Working Conditions Index (Employment), or the Housing Access Index (Housing). The time series data – which goes back to 1994 – are continuously updated and accessible online in different formats. In 2008 the Barometro Social de Espana was
also published in book format as a one-time social report on the Spanish society (Colectivo Ioé 2008).

La calidad social en Andalucía, España y Europa – a second Spanish research-driven initiative – also consists of a system of social indicators aimed at social monitoring at the sub-national, national and supranational level (Bericat/Camarero 2011). The indicator system claims to be a “focalized’, non-comprehensive system. The System of Indexes of Social Quality (SICS) is composed of 17 indexes or composite indicators addressing four broad well-being concepts: quality of life, social cohesion, social challenges and social quality. The indexes are composed of 20 to 30 indicators, addressing 3 to 5 dimensions and 6 to 10 sub-dimensions each. Up to the present, the proposed indicator system, as well as the related data for Andalucia, Spain and Europe, are available in book format only.

The BES - Benessere Equo e Sostenibile (Equitable and Sustainable Well-being) is a recent large-scale project, with the aim of measuring and monitoring well-being in Italy. BES is a joint initiative of the National Council for Economics and Labor (CNEL) and the Italian National Institute of Statistics (ISTAT), involving representatives from stakeholder organizations and external scientific experts as well. The project, launched in 2010, seeks to provide tools for measuring and monitoring progress in Italian society comprehensively, using a set of indicators that are supposed to correspond to the different components of well-being, including sustainability. Measurement dimensions and indicators have been identified in a process that also involved representatives from the civil society in order to provide a certain amount of “democratic legitimization”. The set of about selected 130 – objective as well as subjective – indicators, is structured into 12 domains (e.g. health, education, employment, living standard, social relations, safety, environment, subjective well-being) covering economic, social and environmental dimensions with a special focus on equity and sustainable development.

The BES website (www.misuredelbenessere.it) allows comfortable online access to the statistical information provided for the various indicators. Statistical data are provided for a time period beginning in 2004 – if possible – up to the most recent year for which data are available. Moreover, most – if not all – data are available not only at the national, but also at the regional level. For many indicators the data are also broken down by relevant socio-economic characteristics.
In addition to the online information, a first report on “Equitable and Sustainable Well-being in Italy” as published in 2013. The BES initiative may certainly be considered one of the “best practice” social monitoring activities in Europe.

In the south-eastern region of Europe, only one social monitoring activity has been identified: The Indicators for Monitoring Development Goals, published by the Slovenian Institute of Macroeconomic Analysis and Development, are based on the country’s development strategy. The indicator set has been developed with a view to monitoring and assessing the achievement of the development goals (competitive economy, efficient use of knowledge for economic development, efficient state, modern welfare state and higher employment, sustainable development) agreed upon.

3.4.2 Social Reporting

At present, social reporting is well developed and widespread in southern Europe, although – as demonstrated by the following overview (table 3.4.2) – the majority of the reports were not launched before the 1990s. Thus as regards regular social reporting activities, southern European countries were - compared to other parts of Europe - among the latecomers in Europe.

However, there are also some exceptions to this general observation: Particularly in Italy, some of the social reporting activities have been long-established. Notable is the Rapporto sulla situazione sociale del Paese, published annually by the research institute CENSIS (a private foundation) for more than 40 years, belongs to the most long-standing social reports globally. The report published in 2013 is the 47th edition. Under the title “Italy Today. Social picture and trends”, the report has also been published in English since 1984. A quotation from the announcement of the most recent English version of the report from the CENSIS website provides an impression of its content: “The CENSIS Report ...interprets Italy's most significant socio-economic dimensions at a difficult moment in the country's history. The opening chapter ...is a discussion of how Italian society has turned out to be fragile, isolated, and lacking autonomy. But above and beyond the pivotal role now played by leaders of financial institutions, the pace of Italy's economic growth is slow but follows a sound track: the value of the real economy, the extended time span of development, the emphasis on relationships and representation. The second part of the Report, entitled Italian Society in 2011, addresses some of the main issues that emerged during that year: what is left of the Italian model of development, the causes of the country's economic stagnation, and how to revitalize its growth potential. Finally, the third and fourth parts address a number of specific areas: education and
training, employment, welfare and health care, territory and networks, economic development and its main players, the mass media and communications, the public administration, security and citizenry.” (see www.censis.it/17?current_page_942=2&shadow_pubblicazione=116426). The CENSIS report is well-known in Italy and its launch usually receives a large amount of media attention, followed by a wide public debate.

Table 3.4.2: Social Reporting Activities in Southern Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Institution</th>
<th>Title</th>
<th>Launch</th>
<th>Latest Update</th>
<th>Periodicity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern Europe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Instituto Nationale di Statistica</td>
<td>Rapporto Annuale. La Situazione del Paese (Annual Report. The state of the nation.)</td>
<td>1992</td>
<td>2013</td>
<td>annually</td>
</tr>
<tr>
<td>Italy</td>
<td>EURISPES - Istituto di Studi Politici e Economici e Sociali</td>
<td>Rapporto Italia</td>
<td>1989</td>
<td>2013</td>
<td>annually</td>
</tr>
<tr>
<td>Portugal</td>
<td>Instituto Nacional de Estatistica</td>
<td>Portugal Social</td>
<td>1992</td>
<td>2003</td>
<td>discontinued (formerly 5-6 yrs)</td>
</tr>
<tr>
<td>Spain</td>
<td>Spanish Savings Banks Foundation (FUNCAS)</td>
<td>Focus on Spanish Society</td>
<td>2013</td>
<td>2013</td>
<td>annually</td>
</tr>
<tr>
<td>South-Eastern Europe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Slovenia</td>
<td>IMAD - Institute of Macroeconomic Analysis and Developement</td>
<td>Development Report</td>
<td>2002</td>
<td>2013</td>
<td>annually</td>
</tr>
<tr>
<td>Slovenia</td>
<td>Statistical Office of the Republic of Slovenia</td>
<td>Quality of Life</td>
<td></td>
<td>2012</td>
<td></td>
</tr>
<tr>
<td>Slovenia</td>
<td>IMAD - Institute of Macroeconomic Analysis and Developement</td>
<td>Social Overview</td>
<td>2006</td>
<td>2010</td>
<td>irregularly</td>
</tr>
</tbody>
</table>

Other long-established comprehensive social reports in Italy include the Rapporto Italia, released by the EURISPES-Institute, and the Rapporto Annuale - La Situazione del Paese, published by ISTAT. Both of the reports have also been published annually since more than two decades.
In Portugal and Spain social reporting activities are apparently fewer and seem to be less developed than in Italy. To our knowledge, there is currently no comprehensive social report regularly published in Portugal. The previous report, *Portugal Social*, which had been published several times by the Portuguese national statistical institute since the early 1990s, has been discontinued after the 2003 edition. The subsequent publication *Indicadores Sociais*, also published by the Portuguese statistical institute, is not a social report according to our notion, but a compendium of tables and charts. Another, this time research-driven, Portuguese social report, *A Situação Social em Portugal*, was published twice (1996, 2000) by António Barreto, a social scientist at Lisbon University.

In contrast to Italy, a long-standing social reporting tradition does not exist in Spain, although there have been several attempts to establish a regular Spanish social report. As already mentioned, the report *Barómetro Social de España* (Colectivo Ioe 2008) was published only once in printed format. A new series of reports, *Focus on Spanish Society*, was released by FUNCAS, the Spanish Savings Bank’s Foundation, for the first time in 2013. It is not a full-fledged social report, but rather a booklet aiming “to depict the Spanish social situation and provide brief inquiries into some of its most relevant aspects with the help of statistical data (time series data as well as cross-national data)”.

It is structured in three sections: (I) Spain in Europe, putting Spain in comparative perspective; (II) public opinion trends, addressing particular social issues as perceived by the Spanish public and manifested through opinion surveys; (III) follow-up social data, presenting social indicators relating to issues like demography and families, education, health and welfare benefits services (see FUNCAS website: [www.funcas.es/Publicaciones/](http://www.funcas.es/Publicaciones/)).

Greece is one of the European countries where social reporting activities have been developed only recently: The *Social Portrait of Greece* – the major social report in this country – was published for the first time in 2001 by the Greek National Center for Social Research (EKKE), or more precisely by its Institute of Social Policy (INSPO), and since then every 2-3 years. This report covers issues such as income and income distribution, poverty and social exclusion, the aging population, marriage, fertility, immigration, the labor market, education and health inequalities, etc. The content of the report varies across the five editions that have been published up to now. Different to mainstream social reporting, the Greek report is not exclusively based on quantitative statistical
data, but ultimately makes use of qualitative information as well. The report *Social Portrait of Greece* as well as the respective EKKE website are currently only available in Greek.\(^{12}\)

Slovenia is the only country in south-eastern Europe in which comprehensive social reports are currently published regularly, two of them by the (governmental) Institute for Macroeconomic Analysis and Development (IMAD). The most interesting report *Social Overview* has been published three times since 2006 and is a follow-up publication to the previous “Slovenian Human Development Report”. The *Social Overview* aims “to draw an analytical portrait of Slovenian society, the climate and conditions that prevail in it, and the development trends underlying social cohesion.” The *Social Overview* was born out of the authors’ “desire to consider the general situation and development in Slovenia from a different viewpoint than the predominantly economic perspective” (see website: www.umar.gov.si/en/publications/social_overview/). The most recent report from 2010 has a special focus on “the way we live” and addresses issues like population, employment, household income and expenditures, access to goods and services as well as poverty and social cohesion. Previous editions had an even broader scope and also covered issues related to education, family, the situation of the elderly and subjective perceptions of the living conditions. In its attempt to present a “complex picture of welfare” in the Slovenian society and to put issues on the agenda for public debate, the *Social Overview* reveals itself to be an interesting and valuable newcomer among the national social reports in Europe. It should be added that this report also puts a special emphasis on methodological issues and issues of data quality.

*Quality of Life* is the title of another, more recent Slovenian social report, which was released in 2012 by the Slovenian Statistical Office (http://www.stat.si/eng/novica_prikazi.aspx?id=5139). This new comprehensive report explicitly refers to the suggestions made by the “Commission on the Measurement of Economic Performance and Social Progress” (www.stiglitz-sen-fitoussi.fr) and has obviously also been inspired by the OECD’s “How’s Life” project. The report seeks “to reveal how the well-being and quality of life in Slovenia are mirrored in the available statistical data” (p. 3). It covers ten life domains related to material living conditions and quality of life, such as income and consumption, housing, employment, health, safety, time use, social life and satisfaction with life. For all these

domains the report provides analytical information on the current situation as well as evolutions in Slovenia and also situates the Slovenian situation in a European context. On the whole therefore, *Quality of Life* looks like a very promising new social report for Slovenia.

### 3.4.3 Sustainable Development

Each of the (core) Southern European countries has set up a national strategy of sustainable development, which usually covers all three dimensions of sustainability. Italy is an exception, in that it emphasises the environmental dimension. All these countries also dispose of instruments to monitor (indicators) and report on changes in sustainability. Two of these activities seem to be particularly interesting: The *FEEM Sustainability Index* and the Spanish *Observatorio de la Sostenibilidad*.

The *FEEM Sustainability Index* was released by the Italian Fondazione Eni Enrico Mattei in 2009. This composite index incorporates the economic, environmental and social dimension of sustainability. For each of these dimensions the FEEM Sustainability Index covers the following main sustainability dimensions: economic growth drivers, GDP, economic exposure, population density, well-being, social vulnerability, energy, air quality and natural endowments.

The Spanish *Observatorio de la Sostenibilidad* has published a sustainability report that comprehensively analyzes the social, environmental and economic dimension of sustainable development in Spain. Unfortunately, the institute was closed in May 2013 due to a lack of financial support, which formerly came from the Ministry of Agriculture. The closing of the Centre has been widely criticized. The website, which provided access to the report and additional information, is regrettably no longer accessible (January 2014).

About half of the south-eastern European countries also have adopted national strategies of sustainable development. The three dimensions environment, social cohesion and economy are covered by each of these countries’ strategies, as well as by the related reports and indicator sets. Interestingly, the Slovenian strategy also incorporates a cultural dimension. No national strategies of sustainable development have been set up as yet in Albania, Bosnia and Herzegovina and Macedonia, while for some of these countries sustainability indicators are available, however, usually from the EU Sustainable Development Strategy.
4. Social Monitoring and Reporting in Europe: Patterns and Trends

4.1 General Patterns and Observations

4.1.1 Widespread Practice in Europe

Based on the previous sections of this report, we may conclude, as a first general observation, that social monitoring and reporting activities are currently very widespread in Europe: The results of our stocktaking exercise demonstrates that there are plenty of regular social monitoring and reporting activities going on at national as well as supranational levels. As an outcome of a long-term movement initiated in the early 1970s some sort of social monitoring and reporting activity has emerged since then in almost every European country. As a consequence, there are only very few blind spots left on the European social monitoring and reporting map: The only countries for which we did not find as yet any noteworthy social monitoring and reporting activities at the national level, are some of the young nations in the Balkan peninsula and Luxembourg, where respective activities are under preparation.\(^{13}\)

4.1.2 Considerable Similarity and Convergence Concerning Domains Covered

As far as the content in terms of the coverage of certain life domains is concerned, the currently existing social monitoring and reporting activities exhibit a remarkable degree of similarity. A key set of life domains – such as material living standards, employment, education, health, housing, social security – is covered by a majority of the relevant activities. This observation is strikingly confirmed by table 4.1.2, which compares the coverage of life domains in selected comprehensive social reports in Central/Western European nations.

Similar findings have been reported by Hagerty et al. (2002) and the social reporting pioneer Sten Johansson (2002), who concludes: “I was very intrigued by the fact that “my” list was very similar to the lists developed in other countries, even if the political systems and cultures were very different. [...] I think that the lists also reveal a high degree of universalism in what is considered as social concerns in all countries.” (Johansson 2002: p. 25-26). Interestingly, in many – though not

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\(^{13}\) In 2009 the Luxembourg Government mandated the Economic and Social Council (ESC) and the Higher Council for Sustainable Development (HCSD) with producing a system of well-being indicators going beyond GDP. Several seminars and workshops on measuring well-being, sustainable development and quality of life have been held in this framework. A system of 63 well-being indicators, structured in 11 domains, was presented in 2013. These indicators will be the basis for a comprehensive report, which is planned to be published every two years.
all – of the existing social monitoring and reporting activities, the number of life domains covered go well beyond the eight domains identified as relevant for well-being measurement by the Stiglitz et al. Commission.

### Table 4.1.2: Domains covered by selected social reports (Western / Central Europe)

<table>
<thead>
<tr>
<th>Domain</th>
<th>Bericht über die soziale Lage (Austria)</th>
<th>Indicatoren, Herman Deleek Centre (Belgium)</th>
<th>Vrind (Belgium)</th>
<th>Portrait Social (France)</th>
<th>Datenreport (Germany)</th>
<th>Measuring Ireland’s Progress (Ireland)</th>
<th>De sociale staat van de Nederland (Netherlands)</th>
<th>Sozialbericht, FORS (Switzerland)</th>
<th>Social Trends (UK)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social security</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Income</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Poverty/Social exclusion</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Employment</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Demography</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Health</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Housing</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Education</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Sustainability</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Leisure time</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Mobility</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Safety</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>

Source: Boelhouwer (2013)

#### 4.1.3 Diversity in Notions of Well-Being and Approaches of Social Monitoring and Reporting

Despite the striking degree of similarity in terms of domains covered, there are also many important and significant differences between the various social monitoring and reporting activities as documented in the previous sections. Leaving aside the many differences in detail, the resulting diversity concerns, first of all, the general aims as well as degree and kind of conceptual underpinning of the various activities, and, second, the underlying notions of well-being.

As far as the general aims and conceptual underpinning of the social monitoring and reporting activities are concerned, there are obviously different approaches and models to be distinguished. While some social monitoring and reporting activities, for example, explicitly seek to measure, monitor and assess the well-being of people, others follow more indirect approaches, for example by addressing social concerns or policy goals.
More generally, it seems useful to distinguish between concept-driven, policy-driven and data-driven approaches towards social monitoring and reporting: While concept driven approaches depart from conceptual considerations, e.g. on well-being, quality of life or sustainability, in order to identify the dimensions to be monitored or reported on, policy driven approaches depart from policy concerns and objectives, which have been agreed upon in political discourses or decision-making processes. While concept driven approaches are organized around and focused on the dimensions and sub-dimensions identified as the crucial components of certain concepts like quality of life, social cohesion or sustainability, policy-driven approaches are basically focused on the achievement of policy concerns and policy goals. The Europe 2020 Indicators set, as well as the various indicator collections used within the Open Method of Coordination, are good examples of policy-driven monitoring approaches, while the European System of Social Indicators and the Swiss Social Report turn out to be good examples of concept-driven approaches. In contrast to concept and policy-driven approaches, data-driven approaches are usually very pragmatic, only taking considerations of data availability into account or simply focusing on specific data sources. Examples of the latter include monitoring activities and reports, which have been established in some European countries in recent years, and that are exclusively based on data from the EU-SILC.

In the cases where social monitoring and reporting activities explicitly address well-being or quality of life issues, the notion of these concepts may vary considerably.\(^{14}\) While some activities are limited to objective living conditions or even just issues of material living standards, others include components of subjective well-being and other non-material aspects of well-being as well. Some activities focus on individual resources – like early Scandinavian approaches – while others focus more on final well-being outcomes. Another relevant distinction in the notion of well-being or quality of life concerns the inclusion of issues of the “quality of society” – for example issues of social cohesion or governance. It may be added, that – in our opinion – the Stiglitz at al. Commission has not only encouraged statistical institutes at the national and European level to focus their monitoring and reporting activities more explicitly on concepts like well-being, quality of life and sustainability, but has moreover also contributed to a more harmonized and unified notion of these concepts.

\(^{14}\) Similarly, monitoring of and reporting on sustainable development is clearly affected by different notions of the concept of sustainability: While some activities cover economic, environmental and social sustainability, others address environmental issues only, and while some activities make use of the so-called pillar approach, others are based on the so-called capital approach.
4.1.4 Agents of Social Monitoring and Reporting

Activities of social monitoring and reporting in Europe are carried out by a variety of protagonists and embedded in different institutional frameworks. A basic distinction concerns their status as “official” rather than “non-official” stakeholders (Noll 1997: 8ff.). Among the most noticeable and important “official” protagonists of social monitoring and reporting at the national level are national statistical institutes, governments and ministries, as well as governmental agencies (Figure 4.1.4). At a sub-national level regional and local authorities, such as city councils and regional administrations, play an important role too. At a supranational level, European Institutions and supranational organizations are major “official” players.

Figure 4.1.4: Agents of Social Monitoring and Reporting

<table>
<thead>
<tr>
<th>Official</th>
<th>Statistical Institutes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Governments/Ministries</td>
</tr>
<tr>
<td></td>
<td>Governmental Agencies</td>
</tr>
<tr>
<td></td>
<td>European Institutions</td>
</tr>
<tr>
<td></td>
<td>Supranational Organizations</td>
</tr>
<tr>
<td></td>
<td>Local/Regional Authorities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-Official</th>
<th>Research Institutes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Think Tanks</td>
</tr>
<tr>
<td></td>
<td>NGOs</td>
</tr>
<tr>
<td></td>
<td>(Welfare) Associations</td>
</tr>
</tbody>
</table>

The non-official protagonists of social monitoring and reporting activities include public and private research institutes, think tanks, NGOs, as well as welfare or charity organizations at national and other levels.

Who is in charge obviously has an impact on how social monitoring and reporting activities are carried out and seems to account for differences in analytical depth, sophistication of methods, style of presentation and other distinctions. A closer look reveals that — depending on the type of agent — monitoring approaches and social reports are affected by specific characteristics, while typical strengths and weaknesses may be identified for each protagonist of course.
A first distinction concerns the general orientation and framework. While the activities promoted by research institutes and think tanks usually turn out to be primarily concept driven, activities under the auspices of official agents, like NSIs, governments, or supranational organizations, are usually more policy-driven or data-driven. As already mentioned above, exemplifications of clearly concept-driven approaches of social monitoring and reporting include, for instance, the *European System of Social Indicators* developed by the Social Indicators Research Centre of GESIS, and the *Swiss Social Report* hosted by FORS. Clearly, policy-driven approaches are, for example, the *Europe 2020 Indicators*, the OECD’s *How’s Life* initiative, and the *Measuring National Well-being: Life in the UK* program set up by the Office of National Statistics in the United Kingdom.

Among the characteristics of social monitoring and reporting activities put forward by statistical institutes, the following are usually considered as their particular advantages and strengths:

- A firm and enduring institutional framework
- Accurate and reliable data sources
- Continuity of monitoring and reporting across time
- Authoritative status
- High degree of visibility
- Policy relevance and proximity
- Timeliness

Characteristics of monitoring and reporting activities that frequently have been considered as weaknesses include:

- Comparatively low degree of analytic depth
- Lack of theoretical underpinnings
- Absence of normative assessments and interpretation

As far as social monitoring and reporting activities under the auspices of governments are concerned – e.g. the *Poverty and Wealth Report* published by the German Federal Government – the following characteristics are usually supposed to be advantageous:

- Broad visibility and media attention
- Agenda-setting functions
- Policy impact
- High degree of binding

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15 See also Hicks (2013)
16 See also Bieber (2013)
The weaknesses of governmental approaches to social monitoring and reporting primarily include:

- Partisanship of activities
- Propensity to avoid trouble spots and bad news
- Propensity to claim responsibility for positive developments, and to avoid accountability for negative developments

Compared to governmental institutions, but in principle other “official” approaches as well, the four most important general strengths of social monitoring and social reporting by independent private or public research institutes or think tanks seem to be the following\(^\text{17}\):

- Degree of independence and autonomy
- A considerable innovative potential
- A theoretically or conceptually informed and analytically focused presentation
- The degree of reflexive and interpretative competences.

On the other hand, several weaknesses have been observed, notably regarding:

- Timeliness
- Low degree of institutionalization
- Possible nonpermanent funding
- Accessibility
- Visibility
- Continuity across time
- Low degree of binding

Comparing and balancing the strengths and weaknesses, advantages and disadvantages of the different proponents of social monitoring and reporting activities, it becomes obvious that there is no one best practice solution. As there obviously is no one and only model of best practice, a plurality of agents and approaches seems to be preferable instead.

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\(^{17}\) See also Suter / Ravazzini (2013)
4.2 Some Recent Trends in Social Monitoring and Reporting in Europe

In addition to the general patterns characterizing current social monitoring and reporting activities, our stocktaking exercise also allows to identify a number of significant changes and trends on this account:

- At a European level, social monitoring and reporting activities have gained in importance considerably. This is particularly the case as far as European (evidence-based) processes of policy making are concerned (e.g. Europe 2020, Open Method of Coordination), in which monitoring instruments and social reports are to some extent mandatory and are increasingly being used explicitly and officially.

- Supranational organizations – like the OECD – have paid particular attention to issues of well-being and quality of life measurement in recent years and given high priority to respective monitoring and reporting activities.

- At the national level, a new wave of social monitoring and reporting activities emerged in Eastern Europe and the Baltic States after the change from socialist to post-socialist economic and political systems. In addition, new monitoring instruments and social reports have been launched in some of the nations in central (e.g. Switzerland), western (e.g. Belgium, Ireland) and southern (e.g. Greece, Italy, Spain) Europe.

- The Scandinavian countries, which were among the pioneers and forerunners in social reporting, have more recently seen a considerable decline of related activities. In almost every one of the Nordic countries (Denmark, Norway, Sweden), previously published social reporting series have been discontinued during the last decade or so. Moreover, in Sweden the “level of living survey” – a unique large-scale and long-standing welfare measurement and monitoring program – has also been discontinued and replaced by the Swedish EU-SILC part. Up to now, we can only speculate at best about the reasons behind this development, which seem to be manifold. Aside from more practical factors, like institutional changes and financial restrictions, the declining interest in social monitoring and reporting activities in some of these countries may also be linked to the processes reshaping welfare state policies that have taken place in Scandinavia during the same period.

- National social monitoring and reporting activities are increasingly adopting a European perspective and are becoming increasingly comparative in nature, by putting their own country in a European context and comparing national achievements with European best practices.
• While there are many long-standing social monitoring and reporting activities existing in Europe – some of them going back as far as to the 1970s – the recommendations made by the Stiglitz et al. Commission have triggered a wave of new activities in recent years, particularly within the European Statistical System at the national and European level. Among the new activities are, for example, the Quality of Life indicators project initiated by EUROSTAT, the BES project in Italy, the report on “Quality of Life” published by the Statistical Office of the Republic of Slovenia, and the EU-SILC module on quality of life, which was run in 2013 for the first time.

• A remarkable change concerns the use of subjective indicators and the role of subjective issues in social monitoring and reporting activities under the auspices of official statistical institutes at national and supranational levels. While subjective measures in general have been used by statistical offices only occasionally, if at all, and issues of subjective well-being were disregarded almost completely within the European Statistical System until recently, a considerable change has taken place on this account in the meantime. To some extent this change in attitudes and priorities may be due to the generally increasing recognition of subjective indicators and attention paid to issues of subjective well-being in academic and policy discourses. However, the much more prominent role given to subjective measures and issues of subjective well-being also seems to be a direct outcome of the Stiglitz et al. Commission’s notion of well-being, as including objective and subjective components, and its recommendation to collect and use subjective information by official statistical authorities too.

• Another observation resulting from the stocktaking in the field of social monitoring and reporting concerns the fact that some long-standing social reports have been discontinued and recently replaced by “post-Stiglitz et al. activities”. Examples are France, where the long-standing report Données Sociales: La société française – published by the French statistical institute INSEE since 1973 – was discontinued after the 2006 edition, and has been replaced by a follow-up project on Measuring Quality of Life in France in response to the Stiglitz et al. Commission’s report (with results being published in the France, Portrait Social). Similarly, in the United Kingdom, the long-standing report Social Trends has been discontinued, being replaced by a new report on Life in the UK as part of the Measuring National Well-being Program (see 3.2.1 ). At this stage it is still too early to assess the new reports and activities compared to the previous ones. However, there are some indications that these changes may be accompanied by a tendency to eventually reduce the comprehensiveness and complexity of well-being measurement and monitoring (e.g. a
strong focus on subjective well-being in the *Measuring National Well-being Program* in the United Kingdom).

- As far as the means of dissemination are concerned, electronic and in particular web-based tools of information supply have obviously gained ground compared to traditional print products. On this account, print products, such as social reports published in book format, have to some extent been replaced by publications, such as PDF-Documents, which are accessible solely via the Internet, or by interactive web-tools. On the other hand, there also seems to be a tendency to combine the launch of monitoring instruments, e.g. interactive web-tools, and social reports published in print or other formats. Examples of this sort of combined dissemination strategies include the *Measuring National Well-being Program* in the UK (National Well-being Wheel of Measures and Life in the UK Report), the *BES Project* in Italy (BES - Online Indicator Set and BES Report), as well as the *OECD’s Better Life Initiative* (Better Life Index/Indicators and How’s Life Report).
5. Looking Forward

Based on the previous sections, this final recommendatory part of the report seeks to identify and to discuss selected issues of social monitoring and reporting that are considered to be crucial for further improvements in this field and should thus be put on future research and policy agendas. This section draws heavily from a brainstorming session on “The State and Future of Social Monitoring and Reporting in Europe: Suggestions for a Research and/or Policy Agenda” organized as part of the “e-Frame Workshop on Social Monitoring and Reporting in Europe”, in which several of the following issues and suggestions were identified and brought forward.18

• Content

With a view to attracting public attention, not only in the realm of policy making, the content of social monitoring and reporting activities – in terms of comprehensiveness, pertinence and topicality – is certainly a key element. There is thus an urgent need to critically review the contents regularly and thoroughly in order to check for missing or underexposed domains and dimensions as well as the recognition of emerging new trends and problems. Apparently, there is a general challenge in keeping up with the times and in picking up pressing new themes and topics, while simultaneously also assuring comparability and continuity across time. Developing appropriate methodologies to be used as radar devices, allowing the identification of emerging societal trends and problems early on, would thus be desirable and useful in order to improve and ensure the pertinence and topicality of monitoring instruments and social reports.

• Measurement, Data and Analysis

Other key elements affecting the quality and attractiveness of social monitoring and reporting activities include measurement approaches and the adequacy of indicators, data availability as well as modes and methods of analysis. In each of those fields improvements would be desirable. As far as indicators are concerned, there seems to be a need, for example, for developing improved measures of social capital, and as yet there are almost no valid and reliable indicators available allowing the measurement of the “resilience” of populations. While longitudinal data are imperative for capturing and studying individual level changes – e.g. moves into and out of poverty - there are still only few countries in Europe (e.g. Germany, Switzerland, UK) that dispose of long-lasting household panel studies. On the other hand, the availability of relevant data on well-being and quality of life has been considerably improved, particularly as far as pan-European cross-sectional survey data are concerned (Noll 2008).

As far as the modes and methods of analysis are concerned, there obviously is a trade-off between the degree of sophistication and comprehensiveness, which seems to be particularly relevant when it comes to social reporting activities, as social reports not only address experts, but also a broader public.

**Use of Composite Indices**

During the last couple of years we have seen a flourishing debate on the usefulness of composite indices for social monitoring and reporting. This debate is ongoing and continues to be controversial. Given the multi-dimensionality of concepts like well-being, sustainability or progress, there is obviously a demand for measures allowing a balance between the various developments in different domains and dimensions of life and enabling uni-dimensional measurement of multidimensional phenomena. This demand seems to be greatest from a policy maker’s point of view, who not only look for possibilities to synthesize and reduce the complexity of information, but also demand clear-cut diagnostic findings and conclusions. In recent years numerous composite indices – such as the "Human Development Index" or the "Better-Life-Index" – have been proposed to address this demand. Unfortunately, the advantages of composite indices do not come without costs (e.g. loss of information, over-simplification), and the construction of these measurements also faces many methodological difficulties, some of them not yet sufficiently solved.

The controversial debate about the benefits and limitations of using composite measures for social monitoring purposes is thus expected to go on. Rather than debating the issue from a fundamental point of view, it might be more prolific to discuss and to prove for which specific purposes and under which conditions composite indices might be used successfully.

**Now- and Forecasting**

Up to now, social monitoring and reporting activities are exclusively focused on current and past conditions. Retrospective views – usually based on time series data – enable the comparison of past conditions with the present situation and the determination of whether or not changes in individual and societal life quality are to be considered as progress. There are good reasons for assuming, however, that social monitoring and reporting activities might be enriched and become more attractive – particularly for policy makers – by eventually incorporating elements of social now-casting and forecasting and thus to enable prospective views as well. While now-casting refers to projections from the latest data available to “now”, forecasting refers to predictions of future developments. Methods allowing now-casting and forecasting in the fields covered by social
monitoring and reporting are apparently still in their beginnings, however\textsuperscript{19}, and thus more research is needed on this account in years to come.

**Well-being and Sustainable Development**

Although this stocktaking report has covered issues of monitoring and reporting on sustainable development only partially, rather than comprehensively, it still reveals a need to better clarify the relationship as well as boundaries between approaches of social monitoring and reporting and approaches of monitoring and reporting on sustainable development. Currently, the respective activities do not seem to be well coordinated, which not only results in considerable overlaps, but sometimes even in duplication of efforts. Apparently, both approaches claim to some extent to cover the same subject – individual and societal well-being – although from different perspectives and with different emphases. In any case, it seems to be desirable and necessary to better coordinate social monitoring and reporting activities on the one side and activities of monitoring and reporting on sustainability in the future. To this end, it could be useful to create more opportunities for debate and mutual exchange between the two communities, which up to now work more in parallel instead of collaborating with each other.

**Harmonization versus Diversity**

In an integrated Europe, increasingly growing together, efforts to harmonize activities in social monitoring and reporting seem to be essential. On the other hand, the diversity of social monitoring and reporting approaches currently existing at national and sub-national levels, expressing differences in traditions and cultures and allowing topics to be picked up and addressed in specific ways, is also considered of great value and worth preserving. It will thus become a great challenge in future years, to search for solutions to achieving better harmonization among the various approaches without losing diversity and plurality. Generally, it seems to be important to achieve as much harmonization as necessary and to preserve as much diversity and plurality as possible.

**Improving Usability and Continuity**

While there is wide consent that comprehensiveness is of key value in social monitoring and reporting, there are also good reasons to assume that there is a demand for tailor-made approaches and products addressing different groups of potential users, such as policy makers, the media, experts in different fields and the general public – "one size/style fits all" strategies do not always seem to be the best solutions! As it appears, this issue has been rarely touched on up to now.

\textsuperscript{19} See e.g. a recent EUROSTAT (2013) research report on now-casting poverty risks in Europe.
However, there are growing attempts at least to reach out to different groups of potential users, and to better meet their diverging needs through traditional print products, on the one hand, and web-based interactive tools, on the other. In line with these recent developments, further differentiations among the products and services offered may enhance the attractiveness of social monitoring and reporting activities for different categories of users.

Regarding social monitoring and reporting activities, not only is timeliness a concern, but also continuity turns out to be essential. Assuring continuity seems to be easier in the framework of bureaucratic institutions like statistical offices and governments as well as supranational organizations, but is not always guaranteed if social monitoring and reporting activities are hosted by scientific institutes, think tanks and NGOs. For the latter, the introduction of more permanent funding mechanisms could be useful, to better ensure continuity over longer time periods.

**Networking and Collaboration**

Some of the issues raised here – e.g. harmonization vs. diversity, well-being and sustainable development – call for enhanced efforts in terms of networking and collaboration, which may not only help to better coordinate social monitoring and reporting activities across Europe, but also to improve mutual exchange, understanding and inspiration as well as learning from good practices.

To some extent these aims have already been served by a series of “Social Monitoring and Reporting in Europe” conferences held at the Villa Vigoni ([www.villavigoni.it](http://www.villavigoni.it)) annually since 2006. The conferences – recently organized in collaboration with the European Commission – have brought together agents as well as users of social monitoring and reporting activities – researchers, statisticians and policy makers – from all over Europe, including delegates from supranational organizations. Each of the conferences discusses issues of social monitoring and reporting of mutual interest and also addresses specific topics ([http://www.gesis.org/en/social-indicators/products-of-the-zsi/european-social-monitoring-and-reporting/social-reporting-in-europe-european-social-reporting-network/](http://www.gesis.org/en/social-indicators/products-of-the-zsi/european-social-monitoring-and-reporting/social-reporting-in-europe-european-social-reporting-network/)), as for example “The Quality of Society and Individual Quality of Life”, the theme of the 2014 conference. It would be highly desirable to ensure that this conference series is continued and eventually even extended in the years to come.

Moreover, in 2008 the informal **European Social Reporting Network (ESRN)** was founded by several protagonists from various European countries; it may be enhanced in future years and may serve as a basis for further networking activities.
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