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**e-Frame**

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**“A roadmap for future research needs”  
First Tentative**

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## **Deliverable 11.2**

### **“A roadmap for future research needs” First Tentative**

#### **Summary**

Within the activities carried out by the e-Frame “European Framework for Measuring Progress” FP7 project, the “Roadmap for future research needs” represents one of the key results envisaged by the work plan. It is a cross-cutting deliverable as a consequence of the results of all the activities carried out by the Consortium: from the stocktaking work and the discussions and results presented in the e-Frame Conferences and Workshops to the discussion within the meetings of the Advisory Board.

The roadmap aims at addressing research areas that need further developments and investments at a European level in the measurement and use of indicators of well-being, societal progress and sustainability. The roadmap is intended to be a dynamic tool to be periodically updated: three releases are foreseen during the life cycle of e-frame project.

The present document constitutes the first tentative roadmap based on the e-Frame activities and findings achieved in the first year of the project (January- December 2012). The research needs have been identified with a view to the European goals and the aims of Horizon 2020. They have been classified into four main streams: the needs of research which mainly should be developed in the perspective of the measurements related to the official statistics; the needs of research related to the usage of non official data; the needs of research belonging to the communication side; the needs of research looking forward to a wide integrated vision to be developed.

In order to put the research needs into practice, it would be advisable to find a large consensus on priority setting and to schedule future actions in the light of the objectives of Horizon 2020.

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### Main References

## 1. Introduction

A key milestone of e-Frame “European Framework for Measuring Progress” is represented by the roadmap for future research. It represents a cross-cutting deliverable that will benefit from the results of all the activities carried out by the project, particularly from the stocktaking work and from the discussions and results presented in the e-Frame Conferences and Workshops.

The roadmap aims at addressing relevant gaps and research needs to be put at the centre of future research agenda at a European level by the European Commission and by the European Statistical Systems in the area of measuring well-being, societal progress and sustainability. It is intended to be a dynamic tool to be periodically updated and revised as the project results become available.

The present document constitutes the first tentative roadmap based on the e-Frame results achieved in the first year of the project (January- December 2012). It is organised as a self-standing document which starts with a summary description of the research activity and main international achievements, as well as the main purposes of e-Frame project, followed by a more detailed report on e-Frame activities and findings which contributed to single out the major research needs to be undertaken in near future at the light of European goals and the aims of Horizon 2020.

With regard to the roadmap, the research needs have been classified in four main areas in order to facilitate the identification of suitable and coordinated actions for dealing with each selected area. It is worth mentioning that besides research in the field of statistical measurement, important issues to be addressed also emerged, ranging from communicating and targeting the importance of “beyond GDP” indicators to measure well-being and to guide policies for a sustainable development to specific training in this field and to the role of official and non-official statistics.

Last section reports some final remarks stressing the necessity to agree on priorities and to set a timetable for future actions at European level in order to put the well-being measurements into concrete, to support policy makers and to gain a wider and wider audience involving the society at large into the “beyond GDP” debate.

## 2. The “beyond GDP” debate: the research so far

In the last decade, the research on measuring well-being and societal progress “beyond GDP” and on the complex phenomena to it related has grown up, firstly, involving the public and private world of research and, then, becoming a global movement which currently involves countless of local, national and international actors including all stakeholders: civil society organizations, social entrepreneurs, researchers, practitioners, consumers, workers, citizens and society at large.

The discussions on measuring well-being and societal progress are at the forefront of the European and global agenda and the necessity to integrate the macro economic measure of GDP with new indicators is fully recognized also at political level in a worldwide dimension. Moreover, presently the need to go beyond GDP is crucial: a new vision of measuring economic growth is vital in the perspective of the on-going international crisis which highlights the urgency to put ‘Man’ at the centre of the economic evaluations.

Over time, the methodological and conceptual diverse research activities have been pushed by the debate on “beyond GDP” carried on through several specific initiatives.

The OECD began to work rigorously on this thematic since 2001 and, recognising the necessity for a wide-ranging reflection on the various themes and multiple dimensions of the progress of societies, has organised the World Forums to discuss these issues from a global

perspective (Palermo 2004, Istanbul 2007, Busan 2009 and New Delhi 2012)<sup>1</sup>. In 2008, the then French President Sarkozy launched the Commission on the Measurement of Economic Performance and Social Progress (the Stiglitz-Sen-Fitoussi Commission). The Commission stressed the necessity to move the attention from measuring economic production to measuring individual well-being, thereby identifying the limits of GDP as an indicator of economic performance and societal progress<sup>2</sup>.

At a European level in 2009 it was established, by the European Statistical System Committee, the Sponsorship Group on ‘Measuring Progress, Well-being and Sustainable Development’ with the aim of translating the recommendations of the Stiglitz-Sen-Fitoussi Commission into concrete actions in charge of the National Statistical Institutes (NSIs), calling on them to push the definition of sound and timely statistics, thus implying a better use of all the available statistics and developing new statistics and concise indicators. In its final report (2011)<sup>3</sup> the Sponsorship Group outlined a strategy to develop statistical information to meet the Stiglitz’s Commission recommendations, pointing out the development of better statistics related to: 1) household perspective and distributional aspects of income, consumption and wealth<sup>4</sup>; 2) multidimensional measures of quality of life<sup>5</sup>; 3) environmental sustainability<sup>6</sup>.

The research and the debate “beyond GDP” have been greatly enhanced by Internet which contributed enormously to enlarge the community involved in the discussion. Web 2.0, giving the opportunity to share knowledge, information and data, contributes to implement new ways of collecting and producing information involving communities and to collect data from communities (‘Big Data’) driving a reshape of the “definition” of statistics making it possible a bottom-up approach.

One of the recent notable bottom-up approach initiatives is the OECD’s Better Life Index<sup>7</sup>, launched in 2011. The Better Life Index is designed to invite users to visualise and compare some of the key factors – like education, housing, environment – that contribute to well-being in OECD countries. The aim is to allow understanding what drives well-being of people and nations and what needs to be done to achieve greater progress for all. This initiative is once more pushing the research to explore the diverse dimensions of subjective and objective concepts of quality of life.

On the side of the NSIs, called to follow the conclusions of the Sponsorship Group on ‘Measuring Progress, Well-being and Sustainable Development’, bottom-up approach initiatives of stakeholder consultation and dialogue with society at large are currently carried out in Europe and abroad<sup>8</sup>. The Italian National Institute of Statistics (ISTAT) has instituted the CNEL<sup>9</sup>-ISTAT

<sup>1</sup> 4th World Forum <http://www.oecd.org/site/worldforumindia/>, previous World Forums <http://www.oecd.org/site/worldforumindia/previousoecdworldforums.htm>

<sup>2</sup> [http://www.stiglitz-sen-fitoussi.fr/documents/rapport\\_anglais.pdf](http://www.stiglitz-sen-fitoussi.fr/documents/rapport_anglais.pdf)

<sup>3</sup> [http://epp.eurostat.ec.europa.eu/portal/page/portal/pgp\\_ess/0\\_DOCS/estat/SpG\\_Final\\_report\\_Progress\\_wellbeing\\_and\\_sustainable\\_deve.pdf](http://epp.eurostat.ec.europa.eu/portal/page/portal/pgp_ess/0_DOCS/estat/SpG_Final_report_Progress_wellbeing_and_sustainable_deve.pdf)

<sup>4</sup> Four priority areas have been identified in European Statistics, as to be emphasised from the viewpoint of the household perspective and distributional aspects of income, consumption and wealth: (1) Promoting existing national accounts data on household income and consumption; (2) Providing information on the distribution of income, consumption and wealth; (3) Encouraging the compilation of balance sheet accounts for households; (4) Broadening income measurement to non-market domestic activities and leisure time.

<sup>5</sup> The following priority areas have been identified for future work on multidimensional measures of quality of life: (1) Use EU Statistics on Income and Living Conditions as the core instrument; (2) Complement the coverage of the dimensions with additional data sources; (3) Deepen and improve analysis.

<sup>6</sup> A range of priority actions has been identified on the basis of work already in progress as well as policy needs. The first step in this process has already been set by the adoption of an EU Regulation on European environmental economic accounts with modules on air emissions accounts, economy-wide material flow accounts and environmentally-related taxes by economic activity.

<sup>7</sup> <http://www.oecdbetterlifeindex.org/>

<sup>8</sup> In United Kingdom (<http://www.ons.gov.uk/ons/guide-method/user-guidance/well-being/index.html>), in Canada (<https://uwaterloo.ca/canadian-index-wellbeing/>) and in Australia (<http://blog.abs.gov.au/Blog/mapblog2010.nsf/>).

<sup>9</sup> The Italian National Council for Economics and Labour, [www.cnel.it](http://www.cnel.it)

initiative for measuring Equitable and Sustainable Well-being in Italy “BES”<sup>10</sup> within which it has been carried out a deliberative process for the definition of a theoretical framework for the measurement of well-being and the selection of the indicators which are composing it. The result of the consultation has provided a set of indicators, as a decision co-established by Italian society at large, on which the methodological and technical research is going to build up its activities.

### 3. e-Frame project: its main objectives

The e-Frame Project, funded by the European Commission, DG Research and Innovation, under Socio-economic Sciences and Humanities 2011 Programme, responds to the EC’s call<sup>11</sup> “to ensure that European research activities in the field of official statistics and related areas, and, in particular those related to the ‘Beyond GDP’ and related initiatives such as the Stiglitz-Sen-Fitoussi report, take place in a co-ordinated manner.” In particular, “Coordination activities should build on relevant existing research projects and strengthen the European dimension of work in this area in the context of the Europe 2020 strategy, European Research Area (ERA) and the European Statistical System. The activities should establish links and contribute to building or completing research agendas in the field. (..) It is expected that universities and private companies will have access to this data and will participate to the exchange of views and practices for the definition of the future needs of research and for the use of results for policy making. The coordinating action should:

- Collect and assess key output from recent and ongoing Framework Programme projects and other national and international activities in this area (inter alia Valuation of externalities and domestic value added content of trade will be considered);
- Identify and develop indicators characterizing the new statistics (in a broad sense of Social, Environment and Health dimension); aspects like inequalities, social dimension, damage cost, safety and security cost, etc., will be part of this topic;
- Identify research needs and gaps in relevant information and methods and propose research topics to be addressed at the European level.

In this perspective, e-Frame provides its contribution by coordinating activities to foster the debate on the measurement of well-being and the progress of societies among all relevant stakeholders and support National Statistical Institutes’ measurement initiatives in this area. To suit the EU requests, e-Frame is structured into a work plan to rationalise stocktaking activities on the measurement of societal progress and well-being beyond GDP and to organise dissemination events (thematic Workshops and two general Conferences).

Moving from the *stocktaking* on existing indicators and measurements the work plan envisages cross-cutting activities with the aim to provide *guidelines* for the use of the indicators by policy makers and to define a *roadmap* for future research need for the development of the measurement of well-being and societal progress. With the ultimate ambition to state a *European position* on the measurement of well-being and progress “beyond GDP” able to interact at a global level, e-Frame foresees the establishment of a *European Network on Measuring Progress* (e-FrameNET) hosted by Wikiprogress platform (OECD).

#### 3.1 The first tentative roadmap for future research needs

In line with the call which requires to identify research needs and gaps in relevant information and methods and propose research topics to be addressed at the European level, the

<sup>10</sup> [www.misuredelbenessere.it](http://www.misuredelbenessere.it)

<sup>11</sup> [https://ec.europa.eu/research/participants/portal/ShowDoc/Extensions+Repository/General+Documentation/All+work+programmes/2011/Cooperation/h-wp-201101\\_en.pdf](https://ec.europa.eu/research/participants/portal/ShowDoc/Extensions+Repository/General+Documentation/All+work+programmes/2011/Cooperation/h-wp-201101_en.pdf), Work Programme 2011 Socio-Economic Sciences and the Humanities, page 39

project is expected to define a roadmap for future research to be addressed mainly in the context of the next Framework Programme- Horizon 2020<sup>12</sup> and future European Statistical System projects (ESSnet)<sup>13</sup> according to National Statistical Institutes needs and duties.

The roadmap is intended to be a dynamic tool to be periodically reviewed and disseminated. It will move in parallel with the activities related to the set up of guidelines for the use of the indicators by policy making. Starting from project activities, the work will identify which tools are still needed for an effective measurement of progress and which issues need to be better clarified and investigated. A specific focus will identify priorities for future research needs within official statistics. In particular, during the life cycle of the project, dynamic roadmaps will be released as follows:

- first tentative roadmap to be released after the e-Frame Initial Conference (OECD, June 2012, Paris) and the 4th OECD World Forum (October 2012, New Delhi)
- second tentative roadmap to be released after the mid term report of the project which is the 31st March 2013
- final roadmap scheduled on June 2014 - a draft version will be presented in occasion of the Final Conference (February 2014)

Research needs and information gaps should be identified over the wide range of issues related to the beyond GDP debate. The roadmap will collect:

- Feedback from the stocktaking and dissemination activities envisaged by the work plan and others;
- Contacts with the other partners for their suggestions and comments;
- Suggestions from the Advisory Board;
- Contacts with and feedback from similar work underway at national and international level through the e-FrameNET - European Network on Measuring Progress hosted by OECD Wikiprogress platform and other channels;
- Comments and suggestions from the EC.

At this stage of the work, a first tentative roadmap can be traced building on the results reached by the deliverables already released and by the debate carried on during several meetings of the project, during the e-Frame Initial Conference and the 4th OECD World Forum and risen in the web-debate via the e-FrameNET hosted by Wikiprogress.org.

## **4. The debate within e-Frame project carried on so far**

### ***4.1 The e-Frame Kick-off Meeting***

The kick-off Meeting<sup>14</sup>, 26-27 January 2012, represented the first occasion to debate on the topics of the project deepening the aims and the contents of the 12 Work Packages to be developed during the 30 months of the project. The meeting was attended by representatives of all 19 partners, the Scientific Officer of the European Commission, Ms Marianne Paasi, and Ms Marleen De Smedt, adviser to the Director General of Eurostat, for a floor of about 40 people.

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<sup>12</sup> Horizon 2020 Framework Programme for Research and Innovation Running from 2014 to 2020, this EU's new programme for Research and Innovation brings together all existing Union research and innovation funding, including the Framework Programme for Research, the innovation related activities of the Competitiveness and Innovation Framework Programme and the European Institute of Innovation and Technology (EIT).

<sup>13</sup> <http://www.cros-portal.eu/content/essnet-generalities>

<sup>14</sup>

[http://www.eframeproject.eu/index.php?id=96&tx\\_ttnews\[tt\\_news\]=7&cHash=ea37f31701467d2a078f432e55e35899](http://www.eframeproject.eu/index.php?id=96&tx_ttnews[tt_news]=7&cHash=ea37f31701467d2a078f432e55e35899)

During the meeting the general aims, contents and expected results of the project were presented. The high expectations already raised in the European Commission by e-Frame were reported by the EC Scientific Officer as the project contributes directly to the economic, social and environmental objectives of Europe 2020 strategy. Moreover, since statistics is a core tool to measure progress and well-being, as witnessed by important initiatives in the European Statistical System (ESS), it was stressed the importance that two National Statistical Institutes (Istat and Statistics Netherlands) lead e-Frame project. From the perspective of DG Research, e-Frame is an important milestone in the SSH programme and its coordination efforts reduce fragmentation in research and measurement. The composition of e-Frame consortium has all the potential to fulfil these expectations.

The meeting raised an impressive debate sharing views, clarifying the content of tasks and highlighting the common features of the diverse activities foreseen in each WP. Comments and suggestions were gathered from the partners and all the participants in order to define a common agenda for project's future work. Among these suggestions, it is worth mentioning the need to put together macro, territorial and micro-level indicators as stressed by Mr Enrico Giovannini, Istat President. During the debate it clearly emerged the role of e-Frame to contribute in supporting the European Commission in drawing shared conclusions and recommendations on measuring well-being in front of the pressure of the political agenda due to the serious financial and economic crisis. e-Frame will contribute to bring the importance and understanding of new measurements beyond GDP into the policy-making process. The main challenge is to make well-being and societal progress an explicit goal for decision-making in all fields providing governments with advices on the well-being effects of policy options.

#### *4.2 Stocktaking report on subjective wellbeing*

On April 2012, the first report concerning stocktaking activity was delivered according to the work plan of e-Frame. It is the “Stocktaking report on subjective wellbeing”<sup>15</sup> by Saamah Abdallah and Sorcha Mahony of the new economics foundation (nef). The authors highlight how recent years have seen subjective well-being (SWB) rise up both the priority list for NSIs and the agenda for policy makers and politicians<sup>16</sup>. In support of this process, the paper proposes a background on SWB drawing the history of its measurement that can be traced back from 1946 and ending in 2011-2012 with the Final report of the Sponsorship Group for Measuring Progress Well-being and Sustainable Development established by the ESSC and the official regulation regarding the 2013 EU-SILC well-being module. The authors explain why subjective well-being should be part of the measurement of well-being. Among the points that highlight the importance of including SWB measures, they report that well-being is inherently subjective. Moreover, SWB measures can provide a way of quantifying “soft” outcomes on people lives of different policies to be integrated in cost-benefit analyses together with countable outcomes. The authors review different approaches to measuring subjective well-being summarising the main arguments for and against them. They do not recommend any particular approach and suggest that a popular approach emerging is to treat the different approaches as complementary rather than competing. This has been the solution adopted by the dynamic model of well-being developed by nef in 2008 that integrates different approaches<sup>17</sup>. Which SWB measures are used and how they are used depends on what they are being used for. Some information can come from more disaggregated data, that is more detailed SWB indicators, or indeed from analyses of SWB in conjunction with other objectives indicators measuring the “drivers” of well-being.

<sup>15</sup> <http://www.eframeproject.eu/fileadmin/Deliverables/Deliverable2.1.pdf>

<sup>16</sup> The authors suggest that this paper should be read in parallel with the OECD Guidelines on the Measurement of Subjective well-being

<sup>17</sup> Model developed by nef as part of the UK Government Office for Science's Foresight Project on Mental Capital and Well-Being, 2008.

Moreover, the report carries out a stocktaking of different surveys that include subjective well-being measures around Europe and explores their characteristics. Results show that 11 countries in Europe conduct official national surveys with SWB items, while a further one country conducting a semi-official survey. An important finding is that to maximise the value of SWB data other measures need to be collected. The more accompanying data we have the more we will build a picture of how to improve people's well-being and to understand the interactions between different variables. The authors report the interviews to selected individuals within national statistical offices to understand their positions regarding subjective well-being and how data collected on subjective well-being have been used.

The report gives a series of recommendations to those advocating for subjective well-being data, or researching it, on how to better improve the quality and usefulness of the data. Very important are the recommendations to standardise and harmonise SWB measurement and ensure maximum utility. The report ends with a last simple recommendation concerning the use of this information: as there is plenty of SWB data in Europe which does not seem to have been brought to the attention of policy analysts its developments should refer both to the measurement of SWB and to the use of this information by policy-makers.

### ***4.3 Workshop on "Expert meeting on social capital"***

The first workshop of the project took place on 25-26 May 2012 in Maastricht, the Netherlands. This workshop on "Expert meeting on social capital" was organised by the University of Maastricht within the activities of Work package 2 "Beyond GDP". The workshop brought together experts on social capital with the aim to activate debate and promote closer interaction between researchers in this field. It focused on the theoretical and methodological debate on how to improve statistics on social capital; on theoretical and empirical reflections on trust and participations as important aspects of social capital and finally on the main effects of social capital on individual well-being and societal progress. The workshop was organized in 3 sessions: 1) Social capital: Data, operationalization and measurements; 2) Social capital: Associations between participation and trust; 3) Consequences of (a lack of) social capital in Europe and beyond. Each session selected papers that were presented by the authors and commented by two pre-assigned discussants followed by a general discussion. As to the first session, it emerged that NSIs started implementing data collection developments tailored to measuring social capital only recently. Thus the operationalisation and measurement of social capital remain questioned issues due to the multidimensionality of the concept. In the second session presentations explored the potential of creating composite indicators of social capital that allow to avoid and ignore the problem of causal mechanism linking trust and participation. In the last session, presentations addressed the limits to GDP and the relevance to measuring social capital and sustainability. It was pointed out the importance of taking into account income inequality and economic development when studying possible outcomes of social capital. Finally, it was explored the role of social capital in the context of a degrowth economy.

The workshop identified as open issues the multidimensionality of the concept of social capital and the association between participation and trust. It was agreed upon that time-use surveys have great potential for measuring social capital mostly related to aspects such as volunteering and informal help. Moreover, it was highlighted that the time allocated to social capital generating activities can be implemented in a system of national accounts.

#### **4.4 The Initial Conference on Measuring Well-Being and Fostering the Progress of Societies**

##### *The launch of the e-Frame European Network on Measuring Progress (e-FrameNET)*

The Initial Conference on Measuring Well-Being and Fostering the Progress of Societies<sup>18</sup>, which took place on 26-28 June 2012 in Paris, represented the first milestone reached by the project and it was the first grand floor to discuss on the e-Frame topics. The Conference was hosted by OECD and it was organised by OECD as partner of e-Frame, with the Italian National Institute of Statistics and Statistics Netherlands as coordinators of e-Frame and in collaboration with Eurostat and the European Statistical System (ESS). The Conference focused on recent activities in the field of measuring progress and well-being and aimed to foster the European debate on the wide range of issues related to this agenda. It represented a platform for discussing how best to advance the implementation of the recommendations included in the Final Report of the European Statistical System (ESS) “Sponsorship Group on Measuring Progress, Well-Being and Sustainable Development”, adopted by the ESS Committee in November 2011. Moreover, the event stood as the OECD European conference in the preparation of the 4th OECD World Forum, to be held in New Delhi, India on 16-19 October 2012, with the aim to identify concrete deliverables and initiatives in order to contribute with an EU position to the global agenda of measuring well-being and progress. The Conference gathered around 270 policy makers, statisticians, academics, and other stakeholders from the European region specifically interested in the field with the purpose to deepen on-going reflection on how to measure well-being and the progress of societies, enhance the relevance of measures and analysis for addressing key policy issues, and lead to concrete outputs, such as establishing frameworks for future co-operation.

The Conference was organised as a two and a half day event following a thick programme carried on by prominent policy makers, statisticians, economists and analysts. The conference was structured in three themed sessions—*material conditions, quality of life, sustainability*—each one divided into an initial plenary session followed by parallel workshops on specific issues and a final plenary session where to report the discussion held in the workshops and to highlight the open issues. Furthermore, the Conference envisaged several specific Seminars on topics related to the central theme.

A seminar on “Future work of e-Frame project” took place and it was attended by many people who demonstrated great interest in the activities envisaged by the project. During the seminar the project coordinators, Istat and Statistics Netherlands, gave an overview on the topics treated by the project and the results achieved so far encouraging a debate on the topics of the project. Moreover it was launched the e-Frame European Network on Measuring Progress (e-FrameNET)<sup>19</sup> hosted by the Wikiprogress platform (OECD) illustrating how it constitutes a Web 2.0 tool to enlarge and foster the debate on well-being and societal progress facilitating the involvement of stakeholders and society at large in the e-Frame debate. The initiative was largely appreciated as the Network represents a pillar in the establishment of a European position to foster the debate towards the global frontier of Wikiprogress.org.

At the end of the Conference the round table “Moving forward: Paving the way” saw Ms Martine Durand, OECD Chief Statistician and Director of Statistics, together with Mr Enrico Giovannini, Istat President, Ms Lidia Bratanova, United Nations Economic Commission for Europe, Mr Eduardo Barredo-Capelot, Director of Social Statistics Eurostat, to trace the conclusions of the three-day debate focusing on the open issues to bring at the OECD 4th World Forum “Measuring Well-Being for Development and Policy Making”, New Delhi, October 2012. The Conference highlighted crucial key messages to take care for the future agenda. The European agenda on well-being and progress is well established at both measurement and policy levels. Many initiatives have been undertaken in various countries, underlying the growing consensus about the importance of

<sup>18</sup> <http://www.oecd.org/site/progressseurope/>

<sup>19</sup> <http://www.oecd.org/site/progressseurope/FAZIO%20Donatella.pps>

well-being - whilst appreciating their complementary natures differences are also important. At European level there is an increasing convergence between well-being and sustainability agendas. Similar frameworks are adopted by OECD, European Commission and e-Frame project. Although the use of GDP has dominated the mitigation of financial and government debt, and the banking crisis, there are clear calls for parallel metrics on well-being now and in the future. Moreover, the success of well-being and progress initiatives at local, national, and regional level depends on both political leadership and public consultation processes, managed from both a bottom up and a top down perspective.

#### ***4.5 First meeting of the e-Frame Advisory Board***

In conjunction with the Initial Conference the first meeting of the e-Frame Advisory Board took place in Paris on 26 June 2012. The Board, composed of independent outstanding and worldwide known experts<sup>20</sup>, represents the high level body in charge of providing advices and guidance for the development of the activities of the project to ensure high quality and excellence to the outputs.

During the meeting a general overview of the project - illustrating its motivations, objectives and activities - together with presentations of the main achievements reached so far were given by the project leaders<sup>21</sup>.

All the members of the AB reacted with great interest in the project and its work plan and an impressive debate on the themes of the project took place. It was remarked by the AB that the complexity of the work plan and the vastness of the themes would require a strong conceptual and organisational effort by the project coordinator and the Consortium. With regard to the contents of the work plan the following elements were highlighted: the necessity to include the private sector (e.g. Gallup, GRI and SCR initiatives) in the debate in order to enlarge the usual audience; the necessity to educate the market to read new measurements of progress and well-being beyond GDP as a chance to catch; the necessity to study indicators of well being at local, national and global level; the necessity to add knowledge in the stocktaking activity of the project not limiting to portraying existing results but capitalizing them and to highlight the overall sense of the huge amount of work going on; the opportunity to feed the debate to find new ideas and opinion without losing the importance of GDP as an economic measure that as to be integrated (e.g. composite indicators, dashboards) and not to be replaced.

As to the recent international activities related to e-Frame, Mr Giovannini continued the meeting stressing the transnational dimension of e-Frame debate asserting that the interaction between the European level and the global context is the approach to follow to go towards the definition of new indicators on measurement of progress and well-being beyond GDP. Indicators should be harmonized at the global level in order to compare the growth among the continents beyond nations. Mr Giovannini went on referring to the final resolution of Rio+20 drawing the attention on the global dimension of the topic and the constraint to define the target of the users of the indicators of well being. Moreover, he pointed out that it was given the mandate to UN Statistical Commission to develop indicators to present to the Assembly by 2015. Specifically it was indicated to improve the human development index by 2013 and at this aim a Statistical Advisory Board was constituted. Additionally Mr Giovannini highlighted the importance of the forthcoming 4th World

<sup>20</sup> The Advisory Board, chaired by Enrico Giovannini, Istat President and by Gosse van der Veen, CBS Director General, is composed by the following members: Sabina Alkire (Oxford University); Bart van Ark (Conference Board Washington/University of Groningen); Anthony Atkinson (Oxford University); Jeroen van den Bergh (Universitat Autònoma de Barcelona/ ICREA /VU University Amsterdam); Daniel Daianu (former Romanian Minister of Finance); Hubert Escaith (World Trade Organization); Jean-Paul Fitoussi (OFCE); Jeni Klugman (World Bank); Alan Krueger (Princeton University); Khalid Malik (United Nations Development Programme); Andrea Saltelli (JRC-ISPRA); Joseph Stiglitz (Columbia University)

<sup>21</sup> Namely: Ms Marina Signore (Istat), e-Frame Project Coordinator; Ms Donatella Fazio (Istat), e-Frame Project Manager, Rutger Hoekstra (CBS), co-chair Consortium Management Board.

Forum of New Delhi stressing the commitment to define a new policy framework and the crucial importance of the political approach. He noticed how the growing importance of this approach is well witnessed by the new sentence that appears in the OECD logo “Better policies for better life”. At a European level, Mr Giovannini reported about the Conference of European Statisticians which was held in June 2012 which delivered a report on sustainable development. He underscored how the great discussion that took place among the participants in the conference to draft the above report witnesses that it’s not fully clear what is the way to follow.

The members of the AB interviewed on the communications given by Mr Giovannini advising that: it is necessary to deepen all the issues related to well-being; e-Frame has to be flexible to follow the changes and the debate within Europe and worldwide; e-Frame has to participate to the main events organised worldwide in order to follow the advances on well-being.

As a further item of the meeting it was presented the e-Frame European Network on Measuring Progress (e-FrameNET) hosted by Wikiprogress platform highlighting it was structured to encourage proactive contributions on the activities of the project to facilitate the dissemination of the results reached by e-Frame and by ongoing (and concluded) relevant projects on the thematic of beyond GDP.

The members of the AB gave their comments on the e-FrameNET stressing the importance to make this tool as broad as possible to foster the debate at European and global. Some main advises were related to the necessity to link the e-FrameNET with the main projects and related initiatives on well-being and to link the network with other networks on the same topics.

#### ***4.6 The 4th World Forum on Measuring Well-Being for Development and Policy Making***

The e-Frame project participated to the 4th OECD World Forum Measuring Well-Being for Development and Policy Making<sup>22</sup>, 16-19 October 2012, New Delhi. Building on the Better Life Initiative, the main objectives of the Forum were to further the discussions on the different aspects that make for a good life today and in the future in different countries of the world, and to promote the development and use of new measures of well-being for effective and accountable policy making. Thus, an important expected outcome of the Forum was to contribute to the post-2015 development agenda.

The Forum agenda was designed to reflect the conclusions of the four regional conferences on Measuring Well-Being and Fostering the Progress of Societies that the OECD had organised in association with the OECD Development Centre, PARIS21 and regional actors<sup>23</sup>.

The four-day Forum gathered around 800 participants from all over the world, including policy-makers as well as representatives from international organisations, national statistical offices, government agencies, academia and civil society. The programme included a combination of keynote addresses, round tables and themed sessions on material conditions; quality of life; gender, minorities & life course perspectives; and sustainability. Each themed session were organised around parallel sub-themed sessions involving speakers from different backgrounds and perspectives.

Day 1 during the plenary on “Reflections from the 3rd OECD World Forum in Busan and conclusions from the subsequent four OECD regional conferences in Mexico, Japan, Morocco and France”, Mr Giovannini, Istat President, presented the conclusions of the e-Frame Initial Conference (OECD European conference) stressing the debate that took place in Paris and highlighting the open issues to treat during the 4th World Forum. Moreover, during the Seminar on Wikiprogress Networks– Regional Participation to a Global Movement it was presented the e-FrameNET and its progress four months after its first launch in Paris. Besides the above presentations, e-Frame was

<sup>22</sup> <http://www.oecd.org/site/worldforumindia/>

<sup>23</sup> These events, for Latin-America (held in Mexico City), for Asia-Pacific (held in Tokyo), for Africa (held in Rabat) took place in May 2011, December 2011, April 2012 respectively. For Europe the regional conference coincided with e-Frame Initial Conference, Paris, June 2012.

deeply illustrated in the Exhibition Area on “New technologies for visualising statistics as well as initiatives to measure and foster quality of life”. At the e-Frame booth a presentation of the project was set up focusing on its main objectives, its expected results and the main tools and outputs envisaged by the project’s work plan. Presentations of the Consortium and of the Governance Boards of the project were given as well. The e-Frame stall was visited by diverse people attending the forum. Materials on the pillars of the project were distributed to the visitors together with all the relevant information and indications in order to establish connections with the project activities and to encourage the participation to the e-Frame debate inviting to join the e-FrameNET.

The four-day Forum reached its objectives to foster the dialogue on the topics related to the new measurements on well-being and societal progress beyond GDP and e-Frame project was proactively involved in the debate. The conclusions of the 4th World Forum, by Ms Martin Durand, have pointed out that now it is a strong momentum characterized by a large number of local, national, regional, and international initiatives: in all countries of the world (Australia, Bhutan, China, European Union, France, Italy, Japan, Korea, Mexico, Morocco, United Kingdom); at international level (OECD, UNDP, UN Regional Commissions); at regional and local levels; at all levels of society. At this stage of the debate on “beyond GDP” there is a high convergence in understanding of well-being: a common understanding of the issue; a common language for discussion; a core set of similar well-being domains; national priorities reflected in domains and measures. There are challenges to face in the next future which require more research needs: conceptual and measurement questions in some areas; governance issues; social capital and social cohesion themes; built environment and mobility topics; measurement issues even where concepts are clearer; relationship between GDP and prices; relationship between sustainability and dynamics (here and now; there and then); social mobility theme; mental health issue; timeliness necessity. Ms Durand went on stressing how an international research agenda on the more future research needs is crucial for moving from measurement to informing decision-making and how it is essential that the future agenda promotes change by creating awareness and knowledge, impacting on behaviours and decision-making process, involving citizens and civil society, encouraging new business models. Ms Durand concluded the Forum underscoring the virtuous cycle that can be generated by: regular stocktaking for a periodic assessment of where we stand and where progress is needed; sharing experiences on “what works”; considering frameworks for managing trade-offs and synergies; introducing well-being measures into cost-benefit analysis and program evaluation.

## **5. First tentative roadmap for future research needs**

### ***5.1 The diverse dimensions of the future research needs***

Against the “beyond GDP” debate and the research results achieved so far by the diverse European and global initiatives and against the main findings from the discussions within e-Frame project reported above, this section will deliver the first tentative roadmap for future research needs as output of the e-Frame work plan.

The roadmap proposed is the first effort to categorize the topics that require being further developed and investigated in the future research activity to respond to the EC’s call to “*identify research needs and gaps in relevant information and methods and propose research topics to be addressed at the European level*”.

The roadmap, intended as a dynamic tool which aims at identifying a scale of priority of research needs and information gaps, should follow step by step the activities of e-Frame project. The implementation of the project will bring to revise/add/change some of the elements of the current roadmap with the aim to enrich it following the on-going debate.

This first tentative roadmap presents the research needs grouped into four main streams: the needs of research which mainly should be developed in the perspective of the measurements related to the official statistics; the needs of research related to the usage of non official data; the needs of research belonging to the communication side; the needs of research looking forward to a wide integrated vision to be developed.

Finally, it is worth highlighting that the choice of grouping the research needs, as illustrated above, permits an easier reading of the roadmap even if it is necessary to consider the limit of cataloguing the issues related to the research needs that are noticeably and easily cross cutting among the four groups.

### 5.1.1 Measurement issues in official statistics

The European official producers of statistics have been called to follow the conclusions of the Sponsorship Group on ‘Measuring Progress, Well-being and Sustainable Development’ in order to develop new official statistics and concise indicators beyond GDP. This will be achieved by implementing the current surveys and data collection and introducing new surveys and new ways of collecting data (better conceptualization, harmonization, standardization, metadata). Fostering the bottom-up approach initiatives of stakeholder’s consultations and the dialogue with the society at large supported by the Web 2.0 tools would also contribute to put the program into concrete.

To support the process to update the official statistical system to the changing needs for new information that meets the societal and political demands to measure progress, well-being and sustainable development in a more comprehensive way, the following tentative of future research roadmap identifies some specific needs as a result of the activities carried out within the e-Frame project.

An indicative list of the research needs for the above dimension is the following:

- Need to continue implementing subjective indicators
- Need to report indicators at different levels: local, national, global
- Need to disaggregate at the right dimension (target groups)
- Need to harmonize concepts, standards and definitions (metadata)
- Need to improve the timeliness of data
- Need for a multi dimensional approach
- Need for indicators of sustainability
- Need to train at University level on Official Statistics (European Master in Official Statistics)

As reported in the above list, one of the main indications from the activities and discussion made so far has been the need to further implement subjective indicators. Indicators of subjective well-being have the potential of bringing critical information on people’s life, shedding light on the relationship between objective circumstances in which people live and their own evaluation and contentment with them. Most of the existing subjective well being measures have been developed outside the boundaries of official statistics. However, a number of important initiatives in this field have been taken by National Statistical Institutes and International organisations; a review of these initiatives is reported in “Stocktaking report on subjective wellbeing” (nef) of e-Frame project (see section 4.2). In the context of these initiatives, the OECD is preparing a set of guidelines<sup>24</sup> for the collection and use of subjective well-being measures. The aim of these guidelines is to provide

<sup>24</sup> <http://www.oecdbookshop.org/oecd/display.asp?K=5K4DMC46GN44&LANG=EN>

guidance to National Statistical Institutes and other producers and users of survey-based data on subjective well-being.

Moreover, attention has been focused on the need to develop new measures and methodologies to gauge well-being at the local, national and global level. In particular, concerning the local level we can refer to the BES<sup>25</sup> initiative which is being carried out by the Italian National Institute of Statistics and CNEL<sup>26</sup> to implement a stakeholder consultation for measuring Equitable and Sustainable Well-being in Italy. In the Italian experience it appears important to develop indicators that can be disaggregated to a local level able to represent territorial differences; to this effect BES will launch a project in collaboration with 12 Italian cities in order to build a road map for the measurement of all BES indicators also for major metropolitan areas. On the other side, there is the need to bring the focus of measurement efforts to the global level. As raised from the discussion during the Advisory Board Meeting the interaction between the European level and the global context is the approach to follow to go towards the definition of new indicators on measurement of progress and well-being beyond GDP. Efforts can be extended to plan a global survey.

Attention should be paid also to the need to “disaggregate data by specific and vulnerable population groups allowing for greater insight into the dynamics and factors that cause the individual’s well-being to be threatened”<sup>27</sup>.

On the timeliness front, National Statistical Institutes and Eurostat have to find a way of harmonising EU statistics and appreciably speeding up their availability. Timeliness has improved through a number of actions, including: greater coordination in the delivery of data by Member States; the development and implementation of estimation methods for late data; shortening of the deadlines for the provision of data and the development of flash (early) estimates.

The measuring well being and progress agenda calls for new and improved statistics, aimed at complementing standard economic statistics and developing indicators that have a more direct bearing on people’s life. Concerning the producers of data, the production process should be adapted to collect data on phenomena that cover multiple dimensions. As stressed during the Initial Conference a multi-dimensional approach to well-being can make the difference.

A continuous work is required to NSIs in setting standards, providing guidelines and identifying good practices to produce more comparable data and provide metadata in order to enable a wide range of users to properly analyse and compare data. To this effect it is important the work scheduled in e-Frame project to identify and document good practices on progress measurement among NSIs and to propose a consistent system of measurement.

As pointed out at the Initial Conference of e-Frame there is a convergence between well-being agenda and sustainability agenda even if, as remarked during the 4th World Forum, it is necessary to improve the indicators of sustainability.

### 5.1.2 Outside official statistics data

The demand to measure progress, well-being and sustainable development in a more comprehensive way needs more information and data. Measurement activities however are costly and thus it appears important the role for both official and non-official data. Non-official sources can cover product areas and sectors excluded from official sources, filling important data gaps.

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<sup>25</sup> [www.misuredelbenessere.it](http://www.misuredelbenessere.it)

<sup>26</sup> CNEL, Consiglio Nazionale Economia e Lavoro (National Council for Economics and Labour)

<sup>27</sup> From Canadian Index of Wellbeing Online Discussion at [http://www.wikiprogress.org/images/Summary\\_Report\\_of\\_CIW\\_Online\\_Discussion.pdf](http://www.wikiprogress.org/images/Summary_Report_of_CIW_Online_Discussion.pdf)

An indicative list of the research needs for the above dimension is the following:

- Need to consider non-official data
- Need to complement with initiatives beyond official statistics
- Need to evaluate the roles for non-official data in order to keep down the costs of the measurement
- Need to validate the quality of non-official data

In this context it can be mentioned the Global Reporting Initiative (GRI)<sup>28</sup> which is a network-based non-profit organization that promotes economic, environmental and social sustainability. The GRI's Sustainability Reporting Framework enables all companies and organizations to measure and report their sustainability performance and to contribute to a Green Economy, a central issue debated at the 2012 United Nations Conference for Sustainable Development – Rio+20. Data are provided on the sustainability performance of companies – including carbon emissions, water use and human rights infringement. Most of the world's biggest companies report their sustainability performance. GRI produces a comprehensive sustainability reporting framework that is widely used around the world<sup>29</sup>.

Moreover, it is worth mentioning the numerous experiences of civil society involvement in the production of statistics which can integrate those employed in the GDP measurement and that appears as relevant starting points for developments in EU policy processes that could contribute to enlarge the debate on EU standards for the definition of well-being and social progress.

### 5.1.3 Communication issues

Well-being measures can make a real difference to people's lives if they are explicitly brought into the policy-making process. It is strongly recognized that good dissemination and communication are crucial to inform the diverse stakeholders (civil society organizations, social entrepreneurs, researchers, practitioners, consumers, workers, citizens and society at large), to convince political actors about the relevance of the work on well-being and societal progress and to demonstrate how much has already been achieved in this field.

Communication and dissemination strategies are crucial to enforce the awareness of the importance of “better statistics” on well-being and societal progress for all the stakeholder and in particular an effort has to be driven towards the business world “unable” to read figures different from GDP. Communication and dissemination strategies can enable and encourage public debate and provide decision makers with a wealth of information to develop more informed policies. To this effects data visualisation, including new social media platforms combined with traditional media, need to be enhanced and bought up-to-date.

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<sup>28</sup> <https://www.globalreporting.org/Pages/default.aspx>

<sup>29</sup> On these issues the European Commission has defined Corporate Social Responsibility (CSR) as “a concept whereby companies integrate social and environmental concerns in their business operations and in their interaction with their stakeholders on a voluntary basis. Corporate social responsibility concerns actions by companies over and above their legal obligations towards society and the environment. In October 2011 the European Commission published a new policy on corporate social responsibility: [http://ec.europa.eu/enterprise/policies/sustainable-business/corporate-social-responsibility/index\\_en.htm](http://ec.europa.eu/enterprise/policies/sustainable-business/corporate-social-responsibility/index_en.htm)

An indicative list of the research needs for the above dimension is the following:

- Need to inform and train the business world and educate the market to read new measurements of progress and well-being beyond GDP as a chance to catch
- Need to facilitate the communication to policy makers
- Need to find a wording for policy makers
- Need to develop tools to improve the use of statistics and indicators
- Need to involve communities using the opportunities given by Internet
- Need to foster the culture on the measurement of well-being
- Need to train at University level on the measurement of well being
- Need to educate the opinion leaders to foster the statistical culture

#### 5.1.4 Forward looking dimension

There are inter linkages between the various indicators. The different domains of well-being “are like spider webs and this fact is widely ignored”<sup>30</sup> and often researchers and policy makers work in a specific domain ignoring the critical role of other sectors in progress. Work should be done to look forward to a wide integrated vision identifying the main drivers of well being and to assess the overall impact of alternative policy options on people’s life.

Models should be developed to evaluate the various benefits and costs of policies enacted simultaneously or of a single policy affecting many dimensions at the same time (econometric models of simulation) as well as the long term effects of policies in order to take into account the sustainability of the actions undertaken. At the same time, the construction of risk indicators is necessary to study the social effect of not doing.

Whilst it is no more possible to ignore data produced outside official statistics, quality will become more and more a crucial aspect for sorting out data (and data producers) that can be trustfully used in guiding evidence-based policies: data quality will set out the boundaries of public interest and serviceable data separating them from all the others.

An indicative list of the research needs for the above dimension is the following:

- Need to develop models capable to describe the trade-off between different dimensions and simulate the various effects
- Need to develop risk indicators to measure the social effect of not doing
- Need to construct econometric models of simulation to measure the effect of the policies on well being
- Need to define quality criteria for indicators
- Need to study how the use of well being indicators positively influences the (good) policies
- Need to spread Europe experience in a worldwide dimension

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<sup>30</sup> From Canadian Index of Wellbeing Online Discussion at [http://www.wikiprogress.org/images/Summary\\_Report\\_of\\_CIW\\_Online\\_Discussion.pdf](http://www.wikiprogress.org/images/Summary_Report_of_CIW_Online_Discussion.pdf)

## 6. Final remarks

As resulted from the previous section, there are several important gaps that need to be filled in as well as actions that are started but need to be further developed or implemented.

In many areas, National Statistical Institutes can play a leading role by calculating well-being, societal progress and sustainability indicators that respond to the users' needs and satisfy quality requirements such as timeliness, geographical disaggregation and representativeness, comparability over time and accuracy. They could also adequately support the process of integration of official and non-official statistics given the know-how and the expertise gained in setting quality requirements and in developing statistical models for integrating and jointly analysing data from different sources.

As available resources are limited, it is vital to join efforts and to coordinate research activities at a European level, as already done with the recommendations of the Sponsorship Group. Partnerships between NSIs, the academia and other relevant actors in the well-being debate could contribute to a large extent to reach faster and sounder results in the above mentioned areas.

Particularly challenging needs described in the "Measurement issues in official statistics" and in the "Forward looking dimension" could be better tackled in partnership, even where some demands explicitly call for a NSIs' proactive role.

With regard to the area of "Communication issues", the existing dissemination channels (both official and non-official) can be exploited and complemented by new ones in order to put the well-being indicators "beyond GDP" at the front of the public debate and promote their use by policy makers. In order to increase the use and relevance of "beyond GDP" indicators, it is extremely important to establish a dialogue with the society at large. This can be achieved, among others, by exploiting the potentialities of the web 2.0 and by activating bottom up deliberative processes, as already mentioned in the document.

The roadmap identifies a number of "needs" to be addressed in future research agendas at a European level in order to consolidate the availability and the use of indicators on well-being, progress and sustainable development. Nevertheless, it would be recommended, as an initial step, to find a large consensus on setting priorities with regard to the above mentioned needs and to schedule the future actions in the light of the objectives of Horizon 2020.

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