SIGMA

The bulletin of European statistics

EU social statistics move into high gear

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In *this issue* of Sigma...

The extraordinary European Council on 'Employment, Economic Reform and Social Cohesion – towards a Europe of Innovation and Knowledge', held last March in Lisbon, was the first to construe social policy as a 'productive factor'. It took an integrated view of economic development, technological change, employment and social conditions and acknowledged the importance of the social dimension for the future of Europe.

A strategy has been set up underpinned by commonly-agreed targets in the respective action fields. Hence, statistics are called to monitor developments and to provide the necessary background for political discussion. In addition, the Lisbon Council also gave clear indications for future statistical developments.

Sigma seeks in this edition

- to take an in-depth look at the developments that got under way at Lisbon,
- to consider the potential of current EU social statistics in meeting this demand, *and*
- to discuss the evolving needs in social statistics.

Lothar Jensen, recently nominated Eurostat director, opens up by outlining perspectives for European social statistics after Lisbon.

Commissioners **Anna Diamantopoulou**, Employment and Social Affairs, and **Viviane Reding**, Education and Culture, provide an overview of future EU policy – the road that statistics must follow.

The Directors-General of the respective Commission DGs, **Odile Quintin** and **Domenico Lenarduzzi**, talk about their expectations for current and future EU social statistics before we give the floor to several statisticians: Eurostat's **Hubert Charlier, Antonio Baigorri** and **Michail Skaliotis** share with us their views on future developments in their respective fields of the 'labour market', 'living conditions' and 'education'.

We then bring two Member States into focus – the UK, represented by **John Pullinger**, director of social statistics at the ONS, and France with **Annie Fouquet** of 'Dares', the research and study service of the Ministry of Labour.

Last but not least, we sought the views of **Reiner Hoffmann** of the European Trade Union Institute (ETUI) – a major user of European social statistics.

Also in *this issue*...

Contributions by **Carlos Corrêa Gago**, President of the Portuguese INE, and by Professor **Manuela Silva**, from the Technical University of Lisbon, about information and knowledge and decoding modern society.

We also report on the arrival of a new president at Spain's INE and on an initiative by the German Federal Statistical Office.

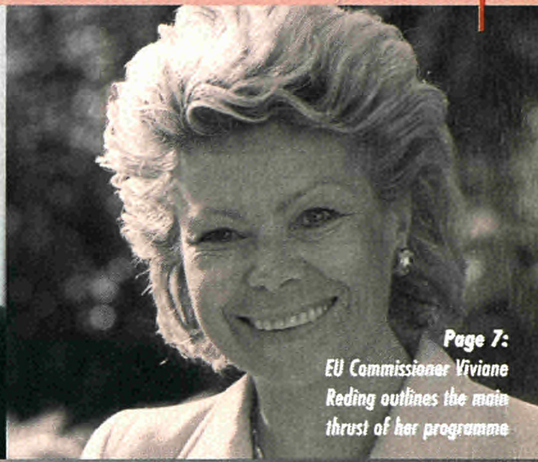
Our series of profiles of European statistical offices continues with an in-depth look into **Statistics Norway**, before we close this issue with a brief presentation of the four newly nominated directors at Eurostat.

Fons Theis
Assistant chief editor

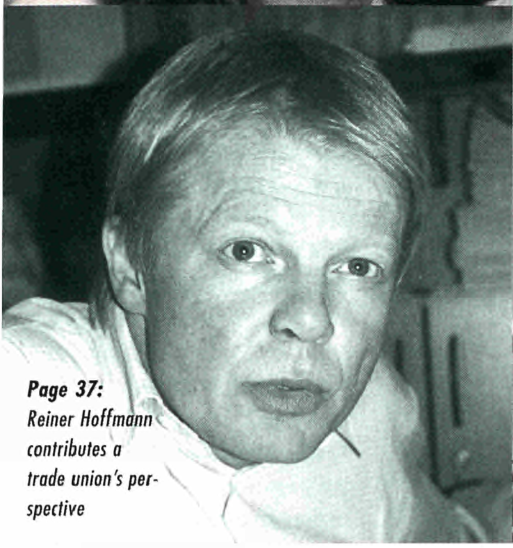
We would like to thank all those who contributed to this edition, in particular:
Francisco Andres Aparicio, Antonio Baigorri, Marc Berthiaume, Dominic Brett, Hubert Charlier, Christophe Forax, Annie Fouquet, Carlos Corrêa Gago, Giorgos Glynos, Reiner Hoffmann, Jan Jansen, Lothar Jensen, Domenico Lenarduzzi, Svein Longva, José Pessanha, John Pullinger, Odile Quintin, Manuela Silva, Michail Skaliotis
– and, of course, to all our 'correspondents' in Member States...

Page 5: EU Commissioner Anna Diamantopoulou talks about her social action programme

Page 2: Lothar Jensen – strategies to satisfy policy demand

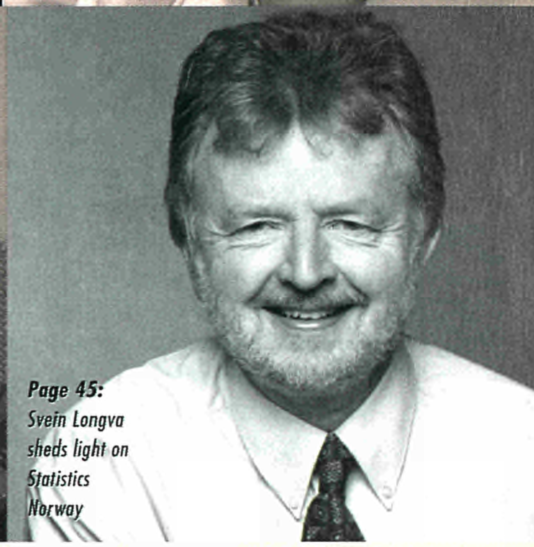


Page 7: EU Commissioner Viviane Reding outlines the main thrust of her programme



Page 37: Reiner Hoffmann contributes a trade union's perspective

Page 33: Annie Fouquet – on the links between policy and statistics



Page 45: Svein Longva sheds light on Statistics Norway

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PROSPECTS FOR EUROPEAN SOCIAL STATISTICS

From Maastricht to Lisbon

Social statistics must bolster the work of social policy. The information they provide must be sound and objective, so helping to identify problems in good time and furnish workable solutions. Furthermore, they must stimulate public debate and, as far as possible, keep it on track. This applies to social statistics at both national and European level.

Socio-political debate and action have long been established at national level and are slowly but surely taking shape at European level. European social statistics will have to take account of this development in the coming years.

The social component of European policies

In political terms, Europe has achieved its greatest successes in fields other than social policy, with the creation of a common market and transition to phase three of economic and monetary union with the introduction of the euro. However, this is not to say that these successes are not also of social significance. It is often said that they have created more social problems than they have solved, thus prompting action at European level. I do not believe this to be the case, at least not in the more general sense, and where there *was* a danger of this happening, a political process has been introduced at European level to nip this trend in the bud.

From Maastricht via Amsterdam, Luxembourg, Cardiff and Cologne to Lisbon and beyond

The drive for solidarity and social integration found its initial expression in the Single European Act, and subsequently in the Protocol on Social Policy in the Maastricht Treaty. The idea was to refine social protection systems in order to improve everybody's chances in general without losing sight of the goal of more equal opportunities.

The Treaty of Amsterdam gave concrete expression to this concern by including a title on employment and incorporating the protocol on social policy. This gave the Community some scope for action in the field of social policy, though this was somewhat restricted and bound by the principle of subsidiarity. Since then, the Commission and the Member States have had to review the employment situation annually and draw up employment policy guidelines. This has brought social policy much more into the limelight of European politics.

In late 1997, when the situation on virtually all labour markets was giving cause for concern, the Luxembourg employment summit was held. Measures were decided on to stimulate the efficiency of the labour markets. The Cardiff summit focused on stepping up the pace of structural reform on the employment market, whilst Cologne concentrated on promoting sound, non-inflationary growth to create new jobs.

However, it is really only since the Lisbon special summit that we have deemed social policy to be on a par with economic, monetary and financial policy.

In the course of this development, a common goal has emerged: the European social model must not just be maintained, it must also be adapted and consolidated. This development was born of the realisation that growth and full employment are not just a question of supply and demand or sound financial or monetary policy, but are also strongly influenced by social factors.

There is still no end in sight to this socio-political process. It will doubtless continue to play a subordinate role, thus encouraging social diversity and competition. But it will also bring the Member States closer together and help establish more common ground in the social field. Which is why every effort must be made to involve the applicant countries in this process over the coming years.

Social statistics after Lisbon

- Since the employment situation is to be reviewed annually, and employment policy guidelines laid down, the need has arisen for European employment statistics that provide indicators for assessing national labour policies and eliminate conceptual differences in, for example, the definition of unemployment.
- Since it has been established at European level that economic and social problems are mutually dependent and of equal value, it has become necessary to record social costs and revenue in order to shed light on problems such as unemployment (female, youth and long-term), equal opportunities, poverty and social exclusion by means of genuinely comparable statistics at European level.
- Since the consolidation and adjustment of the European social systems is now firmly on the European agenda, and since there is a general trend towards best prac-

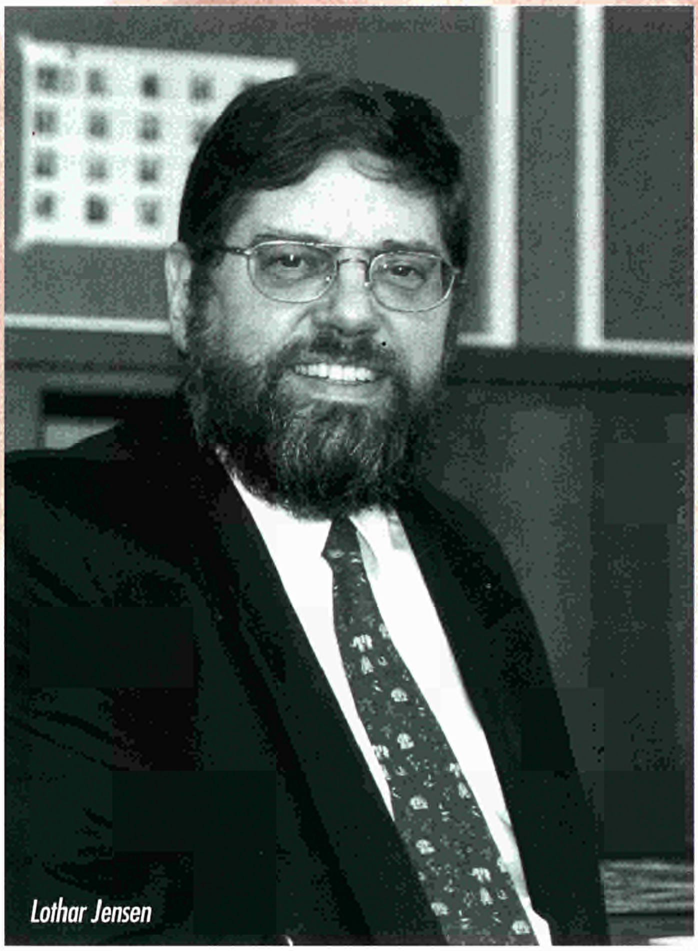
tices and benchmarking in the field of social policy, European social statisticians are called upon to produce comparable and meaningful indicators. For poverty and low wages, these are provided by the European Household Panel.

- Since people have come to understand that a rapidly changing world – we need only think of globalisation, flexibility and the Internet – calls for rapid response at European level, social statisticians have to provide figures at European level much faster than in the past. There is a particular need for indicators to chart phenomena such as lifelong learning, job rotation or flexitime.

However, the task facing Eurostat and social statisticians in the national statistical institutes is far from easy.

On the one hand, there is a need for faster, cheaper and more accurate social statistics – but social statistics that are more comparable and more comprehensive.

As in other fields, social statisticians are being asked to improve the quality of the statistics they produce in terms of speed, accuracy and comparability. Missing data, particularly recent data, must thus be estimated ('flash estimates') and new or more detailed statistics provided for the labour market, education and training, health, migration, culture, etc. There is also an increasing demand for short-term indicators, particularly for benchmarking.


Lothar Jensen

At the same time, statisticians are expected to produce comprehensive and consistent figures, figures that are low-cost, cause the minimum inconvenience and are readily accessible.

The problem is that statistical systems are becoming increasingly diversified and thus harder to handle.

The field of observation – both material and spatial – for social phenomena is expanding to accommodate new policy areas and the forthcoming enlargement. This necessarily produces an increasingly heterogeneous survey system in Europe. The ease with which data from, say, the various social insurance systems can be interpreted, is inversely proportional to the number of countries involved. Each country has a social system that is based on national legislation and national traditions, and these generate the base data accordingly.

The greater the number of statistical systems that need to be evaluated and compared, the worse the problem. Data from the employment authorities must be tied in with, say, data from the health or education authorities. On the one hand, there is a constant clamour for consistency. On the other hand, each and every point of view is valid. For example, the unemployment rate based on the number of registered unemployed is just as meaningful as that yielded by the Labour Force Survey.

In every respect, therefore, the work of social statisticians will get harder, not easier. Their first major challenge will come from enlargement. They will also be dogged by problems with data sources. And they will find it harder to use conventional statistical methods to produce results that are satisfactory at European level. Ultimately, the danger is that they will not always be able to meet the needs of users, who will necessarily become more demanding at European level.

Strategies

In view of these challenges and a realistic appraisal of what European social statisticians can actually do, a number of measures and organisational choices seem inevitable. To my mind, European social statisticians must...

... be more persuasive and accountable

New and more detailed statistics come at a price. This is the message that must be got across to the budgetary authority (the Parliament), the legislator (Council and Parliament), the budgetary administrators (the Commission DGs) and, indeed, a general public that is bent on transparency.

Official social statistics show an excellent cost/benefit ratio, and relatively modest investments in new or improved statistics could lead to savings or to improved resource efficiency. Basically, social statisticians must show that they are efficient, productive and selective, and that they operate on a sound legal basis.

... concentrate on harmonising output rather than input

Harmonisation is a key challenge to European statistics. Which is why the structural variety of the social systems is causing European social statisticians so much trouble. Faced with the alternatives of harmonising either data collection (input) or the computing of statistics (output), they will have to opt for the latter, at least as things currently stand in terms of integration.

From a statistician's point of view, input harmonisation is obviously more desirable, but in the social field it is also much more costly and sometimes virtually impossible, since the recording of social data is strongly influenced by national jurisdiction and national legislation.

European social statisticians should thus consider the figures they produce at national level to be sufficiently comparable, providing the object of their investigations is sufficiently similar in all the Member States. Indeed, they should actively defend their choice and point out that, even if it *were* possible to increase harmonisation, the price would be crippling costs and a loss of topicality.

... take a more pragmatic approach to European statistics and make national statistics more accessible across Europe

If they are to provide relevant statistical information for current problems, European social statisticians will not be able to avoid making occasional use of trends or interval-based figures rather than exact and time-consuming data. These are easier, faster and cheaper to produce and often suffice for decision-makers. Obviously, this is a stop-gap measure that must be agreed on with users on an ad hoc basis.

They should also concentrate more on preparing nationally compiled figures for European consumption, so making them more accessible. Thought might, for example, be given to setting up a central and nationally networked evaluation team. For one thing, in-depth knowledge of each country's particular features would be an effective way of guarding against premature and over-simplified conclusions being drawn.

... be more willing to explain their methods and the limitations of the statistics they produce

Social statisticians in particular are often able to look at a problem from various angles. However, the wealth of numerical values that such conceptual diversity produces can so easily lead to confusion. Social statistics thus belong to the sets of figures that do not always speak for themselves. The methods used must not only be well documented, but data and methods must be explained to the lay user, as must the advantages of such diversity.

... be prepared to systematically supplement European surveys with ad hoc modules

If social statisticians are to cast light on the problems of today, they must make increasing use of ad hoc surveys, incorporating these into their regular surveys on a systematic basis. The topics of these ad hoc surveys should be decided on in conjunction with political decision-makers. I need only mention the ad hoc modules in the Labour Force Survey which, on the basis of a multi-annual programme, provide statistical information on questions of pressing importance (accidents at work, occupational diseases, transition from school to working life). Thought should also be given to tying these in with the questions asked in the Eurobarometer survey.

... and, last but not least, be open to new set-ups

Social statistics are an ideal candidate for increased formal co-operation in leadership groups (LEGs). To date, experience in the field of health statistics has been encouraging. Within a very short space of time, genuinely useful statistics have been made available.

Likewise, in some areas of social statistics, the time may also be ripe to switch from a parallel mode (everyone doing everything, nobody helping anyone else) to a network mode where the watchword is specialisation (some people doing almost everything for everyone). This form of co-operation could be promoted by assigning European work to the national statistical institutes.

Finally, thought should be given to making greater use of specific work that is done by institutions that are run and supported by Eurostat, other Commission DGs, other European institutions and our partners in the Member States. This would usher in a new phase of integration under the European Statistical System.

Getting it right

I have touched on some of the problems that are encountered in the field of social statistics, but there are many others – content, organisation and legal matters. For example, there is the problem of using confidential and personal data from the sphere of social statistics. To my mind, however, the strategies outlined above may equally well be applied to these and other problems.

If we get it right today, I am convinced that we will be able to overcome all these problems and create a working body of European social statistics that will allow us to cast light on the matters in hand and rise to current and future challenges. We could then come to grips with the enlargement of the Community and its socio-political consolidation, in the field of social statistics at least.

As the social dimension will doubtless increase in significance at European level, there are hard times ahead for European social statisticians. We should take comfort in the fact that hard times are often the most interesting.

Lothar Jensen,
Director of Social and Regional Statistics and Geographical Information System, Eurostat

In the wake of the Lisbon Council, the Commission set itself an over-arching goal: more and better jobs in a cohesive society. **ANNA DIAMANTOPOULOU**, Commissioner in charge of Social and Employment policies, outlines her action programme for the foreseeable future.

Promoting growth, employment and social inclusion

Following Lisbon, the Commission has given itself a major goal: more and better jobs in a cohesive society. We are already working towards this goal with real headway being made in some major areas, not least of which is the Social Policy Agenda, adopted on 28 June 2000.

This new 5-year plan sets out a range of actions for tackling exclusion and promoting growth. These include: creating full employment through the creation of more and better jobs; managing change; lifelong learning; 'upskilling'; preparing for the information society; developing a social security system that encourages independence rather than dependence, and fostering social dialogue.

Other key elements of our work programme, which progressed further at Lisbon, include:

- **'Article 13' of the Treaty** recommending action to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation.
- **Gender mainstreaming,** by incorporating equal opportunities for women and men into all Community policies and activities.
- **Free movement of workers,** providing citizens with access to employment and equal treatment in another Member State.
- **The European Social Fund,** providing European funding for Member State projects to tackle unemployment and help the socially excluded.

Greek Commissioner **Anna Diamantopoulou** has led a varied professional life. She trained as a civil engineer before managing a regional development company. She also became deputy Minister for Industry. Although she is not a statistician, Anna Diamantopoulou recognises the value of statistics as vital to the tasks ahead.

The role of statistics

The role of statistics is to make comparisons between Member States in terms of meeting the objectives set in the various policy fields, evaluating which areas are effective and which need to be improved, but also in terms of providing evidence of best practice, which would be impossible without statistical evidence.

This information, along with qualitative data, plays a key role not only in evaluating programmes but also in developing them to become even more effective in meeting objectives. Statistics are, for instance, vital to examining the effectiveness of Member States in meeting the objectives agreed in the Employment Guidelines set out in our strategy for jobs.

There are many areas within my brief that rely on good statistical collation and/or forecasting. Demography is a particularly illuminating one. Statistics provide us with evidence of the global phenomenon of an ageing population. A decline in the working-age population (16-64) will be observed in a considerable number of European regions well before 2015. This has implications for all areas of employment and social affairs policy – from labour market to equal opportunities, social security and healthcare.

In concrete terms, the ageing of our societies means that if employment continues to grow at an average rate of 0.7% and the maximum (average) employment rate is 75%, then the labour reserves will almost halve by 2015. As a result, significant structural reforms are needed to render social protection more employment friendly and more sustainable in the light of these changes in the population structure. Reforms resulting in higher levels of employment and growth could alleviate the pressures of ageing and maintain the high welfare standards in Europe. Extending active life becomes a major policy challenge.

The objectives of the Employment Guidelines

A key example of how statistics are used can be found in the *Joint Employment Report*. A large part of the report offers a comparative overview of Member States' performance under each of the four pillars of the Employment Guidelines and a thematic assessment of whether policies implemented by Member States comply with the individual guidelines. Examples of good practice are also identified by the Member States, which are subject to a more detailed evaluation, with the purpose of improving the quality of labour market policies.

In monitoring the Employment Guidelines, we are pursuing three objectives:

- Assessing whether the policies implemented in the context of the Employment Guidelines are producing the desired impact. For this purpose, a set of basic performance indicators measuring trends in employment, unemployment and some key macro-economic variables were developed and already used in the *1998 Joint Employment Report*.
- Measuring the policy efforts undertaken by the Member States in transposing the EU-level operational targets set in the first three guidelines on prevention and activation into national policy and evaluating their effectiveness. This calls for common policy indicators developed on the basis of administrative data on beneficiaries of employability policies and on stocks and flows into and out of unemployment.
- Monitoring the progress achieved by Member States over the medium-term towards more structural goals as set by the Employment Guidelines. This needs to be done with the help of structural, performance indicators for areas such as education and training, entrepreneurial activity, employment in services, taxation and equality of opportunities between women and men.

Progress on indicators

Significant progress has been achieved in 1999 with respect to common policy indicators. A set of indicators for the first three guidelines on prevention and activation was agreed in May by the Commission and the Member States under the auspices of the Employment and Labour Market Committee (ELC), and submitted to the Cologne Summit. The Member States were asked to step up the adaptation of their monitoring systems so as to provide data in accordance with the newly agreed indicators in their 1999 implementation reports, thus allowing for a more objective assessment of progress towards the common policy targets.

However, further work still needs to be done, with the aim of reaching an agreement on a comprehensive monitoring system. This will require both the further development of appropriate indicators and the improvement of data collection systems by expanding the capacities at national and European level.

Gaps remain, particularly where the Guidelines commit Member States to qualitative objectives difficult to measure, such as how far workplaces have modernised to be more productive and competitive (Guideline 15). In these cases, the Commission's task is to develop indicators that will reflect the reality of progress towards meeting those commitments on the ground, involving a mixture of quantitative and qualitative indicators.

To that end, we need to look at the variety of existing statistical sources, bearing in mind the issues of coverage and comparability, the areas in which we need to commission new research and to work more closely with Member States to develop new statistical sources.

The success of benchmarking

It is clear that the European Employment Strategy process of measuring and benchmarking progress, on a quantifiable statistical basis where possible, has been seen as a success across the EU. At the Lisbon Council in March 2000, Member States agreed a new series of headline, quantifiable commitments on employment policy, in particular, on raising the employment rate across the EU from 61% today to 70% within 10 years and that of women from 51% to at least 60% within the same period.

In addition, a number of key concrete commitments have been made on education, training and lifelong learning. This underlines the recognition by Member States of the value of shared, measurable targets for employment policy included in the Commission's Employment Strategy.

The question of enlargement

Not surprisingly, statistical information is a vital tool in monitoring and assessing applicant countries' progress in transposing and, above all, implementing, the social *acquis* in areas such as health and safety at work (work accidents statistics) or gender equality. This, in turn, helps to identify possible problems, or areas where efforts need to be intensified.

A particularly fitting example of this process is the joint employment review exercise that the Commission's Employment DG is carrying out with the applicant countries. The aim here is to examine together with the authorities of each country how much progress has been made in transforming their labour markets and adapting their employment systems, using a wide range of statistical indicators. They also agree to a set of objectives to advance the country's labour market transformation, tailor its employment institutions to the demands of our Employment Strategy and ultimately prepare the country for EU membership. ■

The Portuguese Presidency of the European Union had a tremendous significance for social and education policies. In this article, **VIVIANE REDING**, Commissioner responsible for education and culture, outlines the main tasks being undertaken during her term of office and the main thrust of her programme.

Thinking about future LEARNING

When it comes to speaking several foreign languages effortlessly, **Viviane Reding** from Luxemburg sets an excellent example. With an education that was more literary than mathematical – she has a doctorate in life sciences from the Sorbonne – she never really included statistics among her studies. However, during her years as a journalist she read and made a lot of use of statistics. Subsequently, while serving as a Member of the European Parliament for more than ten years, she paid keen attention to the work of Eurostat.

Member States have recognised the urgent need to modernise the European social model by investing in human resources. As Member of the Commission responsible for education, I am determined to forge ahead in response to the mandate handed down by the European Council at the meetings in Lisbon and Feira.

Last May, I presented the '*eLearning*' initiative, which is designed to provide the citizens of Europe with the tools they need to adapt to digital technology. Of course, it is not only for the Commission to respond to this challenge. The Commission wants to define a strategy and a timetable in agreement with the Member States.

The Commission proposal, which got the unanimous backing of the education ministers last June, comprises four parts:

- supplying multimedia computers, with connections to the Internet and high-speed networks;
- training for everyone (pupils, teachers, those with and without jobs);

Adapting to digital technology is the main objective of the 'eLearning' initiative

- development of high-quality multimedia services and content via the strengthening of the educational multimedia industry in Europe; *and lastly*
- development of learning centres and linking them in networks.

'eLearning' is part of a broader plan called *'eEurope'* adopted by the Commission.

Decisive role

In October, I put to the Member States a Community strategy for lifelong education and training based on the best practices observed in Europe and the rest of the world. This area is destined to play a major role in the implementation of what was decided at the Lisbon meeting.

The 'employment package' that the Commission has just adopted reflects this sense of priority by urging greater emphasis on lifelong education and training in the employment policies of the 15 Member States. The education ministers are going to be more actively involved in these employment policies known as the 'Luxembourg process'. In this field, the use of good practices and benchmarking have become unavoidable. Statistics are thus destined to play a decisive role in the implementation of what was decided in Lisbon.

2001 – European Year of Languages

My department is currently working with the education ministries on a paper on the future of education systems in Europe. It will be submitted to the Heads of State and Government at the special European Council meeting that the Swedish Presidency plans to organise next spring.

At the same time, 2001 will also be the European Year of Languages, a year in which the people of Europe will be encouraged to foster a greater interest in teaching and learning languages.

Statistics on the knowledge of a second or a third language reveal significant differences among the Member States. As a rule, the smaller Member States have made more progress. Luxembourg, for example, benefits from its special geographic location, and Luxembourgers can in fact speak a number of languages: Luxembourgish, French, German and very often English. As not everyone is lucky enough to be born in Luxemburg, I believe that this European Year of Languages will be useful.

Schooling in Europe

In June, I presented a report comparing the quality of education in schools, the idea being to stimulate discussions, consultations and decisions at every level and for the benefit of every system of education.

It was no easy task getting out a report of this kind, neither when it was being written nor when it was being published. It involved 16 indicators in four fields: level attained in certain subjects (maths, reading, science, foreign languages, etc), success at school (with emphasis on the dropout rate), evaluation and steering of school education, and lastly the resources devoted to education (teacher training, number of pupils per computer, etc).

Even though the criteria we used were selected after consultation with experts appointed by the Member States and in conjunction with work already done by the United Nations, there were some ministers who were hesitant about the operation. The idea, as I saw it, was not to rank the Member States but to give their education ministries – which in many cases are in the process of reforming their education systems – the tools so that they could do the job with an understanding of what was going on among their neighbours.

Lack of statistics

In the event, it proved very tricky to compile this comparative report. There is a lack of comparative statistics in this field in Europe, despite all the information in the Eurydice database or the European Network for Quality Assurance. We had to get some of the information from the Eurobarometer surveys.

Now that the operation is under way, I am determined to update the comparisons regularly and, if need be, to extend or amend the indicators that have been selected. For this purpose, the statistical work on the quality criteria will need to be improved.

Learning from our neighbours

While on the subject of this operation, I must point out that my intention is definitely not to set out to harmonise education systems in Europe. These systems reflect national differences and will stay as they are.

What I should like to do, however, is to encourage the ministers to look at what is successful elsewhere and perhaps learn something from it. Indeed, I have detected a new willingness among the ministers to move in this direction and to make an effort to facilitate the mobility of students and teachers between systems: the idea of a *curriculum vitae* that means something in other Member States, the idea of a Community framework of basic skills and even – in conjunction with *'eLearning'* – the idea of a European diploma in digital technology. ■

Since the Lisbon European Council, the social dimension has officially been one of the European Union's top priorities along with the economy and employment. This prompted *Sigma* to interview **ODILE QUINTIN**, the new Director-General of the European Commission's Employment and Social Affairs Directorate-General, who set out her thoughts on this fresh impetus for further European integration.

The social dimension – a new priority area of European policy

No sooner had the ink dried on the conclusions of the Lisbon Council than Odile Quintin was appointed acting Director-General and then Director-General of the DG in charge of social affairs and employment. Perhaps this was just a coincidence, but events have certainly dovetailed nicely with the approach favoured by someone who likes to talk about 'rebalancing' the European policy mix.

The thrust of European social policy

What are the dynamics of the current setting for the employment and social affairs portfolio?

The Lisbon Council marked an important step forward. For the very first time, a summit of the EU's Heads of State or Government struck a balance between economic, employment and social policies. The stated objective of making the European Union into

"the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion"

not only creates a new balance between economic, employment and social policies but also underscores the interdependent nature of these policy spheres.

Her professional career has seen Lyon-born **Odile Quintin** become a long-time resident of Brussels. In June 2000, she was appointed the new Director-General of the Commission's Employment and Social Affairs DG at the age of 55. She thus finds herself at the helm of the DG she joined in 1982 continuing a Commission career that saw her working on issues as diverse as fisheries and external relations. For this public-law and political sciences graduate, however, moving from one area to the next was never an abrupt change. "There has been a common thread running through all the stages of my career: my negotiating skills". And as work on building the EU's social pillar quickens pace, this is a talent that should stand her in excellent stead.

What implications do these developments have in your areas of responsibility?

The objectives set out in Lisbon include four key aims forming a platform on which to develop policies within our spheres of competence: these are full employment, sustainable and better quality jobs, the modernisation and improvement of social protection, and, last but not least, social integration.

Pensions and social integration

Within the field of social affairs proper, four objectives were put forward:

- to improve the balance between employment and social protection in such a way as to ensure that work pays,
- to guarantee the security and viability of pensions,
- to promote social integration, *and*
- to maintain and assure the quality and sustainability of health care.

While pensions and social integration are the priority issues, the other two remain very much on the agenda.

And what does that mean in concrete terms?

On the social integration front, for example, we have to define suitable objectives by the end of the year. These will probably cover such matters as access to health care, housing rights and health provision, as well as issues linked to employment and thus to the economic integration of people – as addressed in the employment guidelines.

The situation regarding statistics is a complex one, particularly as a multidimensional approach is required if the concept of exclusion is to be properly understood. What is more, the exclusion indicators have been subject to some delay, caused mainly by the complexity and sensitivity of this issue.

Open coordination

In this context, can you explain the practical operation within your domain of the open coordination method, which affects the competencies of Member States benefiting from coordination at European level?

The basic principle is quite clear. While policies and actions are implemented by Member States, a number of objectives are set at European level on the basis of guidelines. These objectives are then incorporated, in all their component parts, into the national action plans adopted by each Member State.

In the case of employment, these national plans often provide the ministries involved – ministries of employment, finance, economic affairs, education, social affairs and sometimes even industry – with a compelling incentive to work together. The economic and social players also take part in this exercise. What is then organised at European level is an exchange of good practices and a peer review system, at both technical and political level, involving representatives from all Member States and the Commission.

Peer pressure

On the employment side, this pressure by the peers has encouraged some Member States to engage in systematic policy development as proof of improving performance. This also contributes towards loosening the purse strings.

We can also look at the participation rate of older workers, for example – a key factor for raising the employment rate. Last year, when we brought out our package of employment measures, there was an outcry in some Member States, as there was a social consensus on people bringing forward their departure from the labour market by way of early retirement in the wake of corporate restructuring. Today, the line of thinking is changing, and such a turnaround would not have taken place had it not been for the employment strategy, peer pressure and performance benchmarking.

A commitment to equality

The question of equal opportunities can be taken as a final example. Although this is a subject on which there is universal agreement, we had difficulty in obtaining quantified concrete commitments on specific issues such as childcare provision, for example. This year, by contrast, these problems are no longer being encountered, as Member States have realised that the overall employment rate cannot rise without an increase in the rate of female employment, which currently stands at 52.5%.

Without the strategy for employment and without the open coordination method, Member States would not have made such considerable progress. This method usefully complements the traditional legislative approach. Last year, the package of measures on employment was not well received. This year, however, even the most critical countries have reacted positively to the recommendations made, as these are an aid to the labour market reforms which they themselves are putting in place.

The indicator stimulus

Indicators – on performance, follow-up or whatever – are increasingly becoming an integral part of all European policies. Could you spell out the precise role they play for you?

A major role! For a start, we have both qualitative and quantitative indicators. In the context of the strategy for employment, quantitative indicators enable us to make updates and to keep track of precisely those elements which are quantified in the strategy. It is thanks to these indicators that we are able, for example, to evaluate the progress made on the training front or to prevent long-term unemployment. Under the new objectives set out in Lisbon, indicators will be key tools for verifying whether political commitments are being translated into reality on the ground. Our analyses show that greater progress tends to be made in areas where the objectives are quantified.

Secondly, the Commission adopted a Communication on structural indicators and is currently working on the indi-

Information on social protection

The Employment DG basically relies on two Community sources of information and data in the area of social protection: the European System of Integrated Social Protection Statistics (ESSPROS) and the European Community Household Panel (ECHP).

Created in 1981 and recently updated, ESSPROS provides a harmonised and comparable framework for presenting national data on revenue and expenditure in the social protection field. The ECHP provides comparable data relating to the level of household incomes, their sources – including social transfers – and certain socio-economic and demographic aspects affecting individuals, such as employment.

Data stemming from the ECHP ought to make it possible to examine the effects that social policies have in terms of redistribution and behaviour. Over the long term, the ECHP could provide indications as to how social safety-nets, in particular, feature in the context of movements into and out of poverty and employment.

The ECHP is thus a source of longitudinal data, as the survey relates to the same households over time. The two sources are beset, however, by a common problem: the time-lag involved.

For example, the Commission's Report on Social Protection in Europe 1999, which was adopted in March 2000, was based on ESSPROS data for 1996, whereas the information currently available from the ECHP relates to household incomes in 1995. Eurostat is currently making a determined effort to reduce these delays.

cators under consideration which will be submitted to the Heads of State or Government at the Stockholm Council in March 2001. This spring European Council which will be organised each year from 2001 onwards will be devoted to economic and social questions. The presentation of the indicators properly reflects the balance between the four elements of the Lisbon project on innovation, economic reform, employment and social cohesion. This must also be reflected in the summary report.

Indicator of political commitment

For social exclusion, by contrast, the indicators are less sophisticated – a person is currently classified as being poor if his or her income is less than 60% of the national average. These indicators offer less certainty, are more vigorously contested and are therefore less comparable. Reaching agreement on an indicator of social exclusion is a real political challenge. The day a definition is arrived at will be the day when a real political commitment on this subject comes into being.

And on the qualitative side …

Qualitative indicators are also very important, as they accompany the development of the quality concept, which is becoming something of a common strand in our social agenda. Quality in employment, quality in social policy, quality in industrial relations: each is a factor which contributes towards this development – as is, moreover, the combined use of qualitative and quantitative indicators. A major challenge facing both Eurostat and the Commission is to determine how this combined use will work in practice and how the progress made can be measured in real terms. It is clear that certain aspects of the quality concept can be expressed by quantitative data. These two concepts are not opposed to one another.

How do your relations with the Member States stand on this point?

As regards employment, Member States readily agree to take European data as the starting point, as we are well geared up in this regard. Within the Employment Committee, there is even a subgroup that deals explicitly with indicators. On the social protection and exclusion fronts, by contrast, we are often obliged to take national data as our basis. We use these data as examples and take every precaution necessary.

It is true that, at the same time, we have to press ahead with a programme of comparable and approved indicators at European level, but we cannot wait twenty years to make progress in the social protection domain. We are therefore obliged to fall back on national data to illustrate certain elements of political orientation, evaluation and policy implementation.

So do the indicators available to you today meet your expectations?

First of all, I should emphasise that cooperation between our Directorate-General, Eurostat and the Member States has greatly intensified over recent years, above all – but not solely – on the employment side. We have accordingly been able to develop satisfactory, albeit less than perfect, basic performance indicators, especially on quality of employment and flexibility of work. Likewise in collaboration with Eurostat, we have also achieved major progress in breaking down data by gender.

A statistical inventory

It is worth noting that relations with Member States are moving forward, particularly as regards adopting good practices. The approach we now take when working to put in place a data-collection system, as in the case of job vacancies, is firstly to make an inventory of resources that already exist in the Member States themselves, in order to determine whether such resources can be taken as a basis on which to proceed further.

This is an exercise which we undertake systematically nowadays when it becomes necessary to enhance domains or elements of statistical indicators. This method also offers the advantage that Member States become less reluctant to participate when their own ideas and practices are taken as a starting-point. This is what happened in the case of ESSPROS.

Limitations of social data

What is your view of data other than those on employment?

This is another area in which we have made progress recently, but there are still elements in need of improvement. As regards social protection we would like ESSPROS to have data on net rather than gross expenditure and to extend the scope of the database to cover social aid granted via the taxation system, taxes or social contributions levied on social benefits, and recipients. At the moment, we have only limited data on recipients of benefits, which reduces the level of reliability we can achieve on the social-security side. We would also like ESSPROS to include figures on net, rather than gross, expenditure.

On the other hand, the European Community Household Panel (ECHP) is a tool which, despite having improved considerably, still exhibits a number of deficiencies. Coverage is not exhaustive, as the Panel does not encompass all Member States – Sweden is a non-participant. Comprising a total of just around 60,000 households, the sampling base is barely sufficient, given that only a minority of households are affected by social-security matters, invalidity and unemployment.

Another aspect in need of improvement is data freshness. Data on exclusion and on poverty are not sufficiently recent. Thanks to the Labour Force Survey, in particular, we have made considerable progress regarding the freshness of employment data, but this cannot be said in respect of data on social protection. Indeed, the point has been reached where policy monitoring efforts are being hampered. Improvements to the quality, regularity and freshness of social-cohesion data are the priorities.

As far as social-cohesion indicators are concerned, we are now at the stage we reached twenty years ago in the employment sphere prior to the introduction of the Labour Force Surveys. We therefore need to make a quantum leap forward, and this has to be the main focus of our efforts. ■

Lifelong education and training are playing a central role in the advent of the knowledge-based society. *Sigma*'s FRANÇOIS VERMEULEN went to find out more from **DOMENICO LENARDUZZI**, Deputy Director-General of DG 'Employment and Culture' at the Commission.

New challenges in

When the Deputy Director-General of DG 'Education and Culture' starts talking to you about education and training, there are two feelings that emerge: a sense of pride in running some of the Community's most popular programmes such as Socrates[1] and Leonardo[2], and at the same time a sense of being at the centre of events as they are happening.

Domenico Lenarduzzi has put in nearly 20 years of service in the Directorate-General for Education and Culture, where he has been Deputy Director-General since October 1999. Mr Lenarduzzi studied both applied sciences and human sciences and joined the European Commission in 1965, after a brief spell in the economics department at the *Université Catholique de Louvain* in Belgium and at the European Court of Auditors. Born in Turin but proud to claim Friuli as his home, Mr Lenarduzzi welcomes the increasing importance of education and training on the European agenda.

Education and innovation

"The Lisbon European Council was a major event for the knowledge-based society and social cohesion, and in general for a whole range of issues affecting everyone in Europe. The Council noted that we were living in a rapidly changing society in which knowledge played a fundamental role and that in the era of the information society education and training were the 'stumbling blocks' hindering all policies, whether economic, social or other.

"It was the first time that such a point had been made by Europe's Heads of State at a European Council meeting. What is more, they were not content with simply drawing conclusions but went on to set definite objectives and a timetable for their implementation.

"In the realm of education and culture, the avowed aim is

- to equip every school in the European Union with computers and to hook them up to the Internet by 2001,
- to make all pupils 'digitally literate' so that they can make intelligent use of the new technologies at their disposal by 2003,
- to train an adequate number of teachers in the use of the new tools and new material so that they can pass on their knowledge to young people, *and*
- to halve the number of young people who have not completed their upper secondary education by 2010.

That is the first part of the new approach."

Education and employment

"The second part concerns employment. More and more qualifications are needed for jobs in the knowledge-based society. Scientific, technological and even cultural changes are occurring at a faster pace.

"Nowadays, everything we know gets rewritten every

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seven years, whereas thirty years ago it took a quarter of a century. This explains why we no longer talk about continuous training but rather about lifelong education and training.

"This faster pace of change means that people have to adapt to the need to be trained and to keep on learning new skills to ensure that they can always compete in the job market." Therefore our society has the duty to ensure each citizen the best education and training possible which allows individuals to maximise their abilities and thus enjoy their rights to the full.

"I am not giving anything away when I say that it is the countries that have invested most in education and training that have experienced the fastest economic and social growth. Ireland is a clear case in point – even if it started off much farther behind – but it is also true for other Member States."

What exactly is your role in relation to the Lisbon objectives?

"The first thing you have to realise is that this all comes under subsidiarity, meaning that education and training are the responsibility of the Member States. The Commission nevertheless has a dual role:

- an active role in the form of the programmes that it runs directly, such as Socrates and Leonardo,
- and a role as strategic coordinator of other actions, especially with its communication on eLearning and lifelong learning and its referencing of education systems, as with the first report on the quality of schooling and the various publications from Eurydice such as *'Key Data on Education in the EU'*."

Elaborating indicators

As far as these latter reports are concerned, there has indeed been some criticism of shortcomings in the data and of the difficulty of making any real comparisons.

"Indeed, it is very difficult to compare, let alone make value judgements about education systems that are so different. In some countries compulsory schooling stops at 15, and at 18 in others. Children sometimes start primary school at the age of five; elsewhere, at seven.

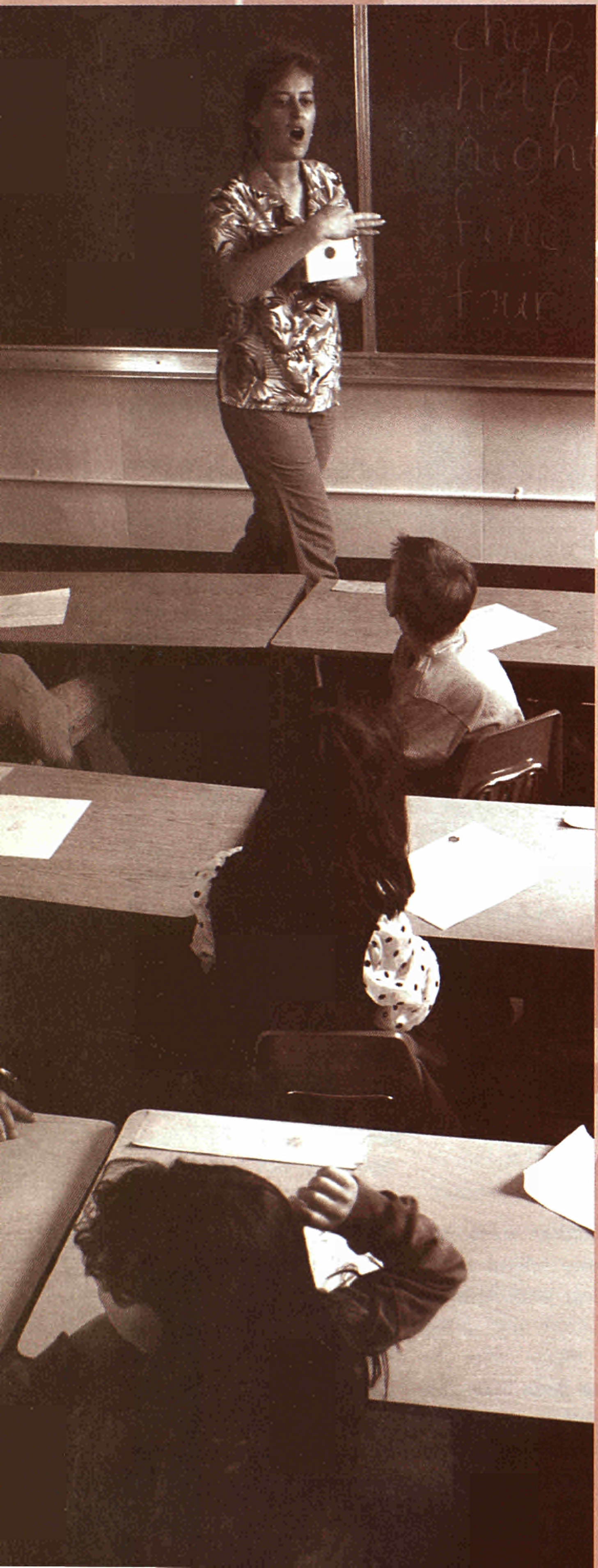
"Of course these indicators are not perfect, but it is a start. Anyway, in conjunction with the Member States we are endeavouring to devise a methodology for elaborating the indicators that are needed to attain the Lisbon objectives. The Commission has just forwarded a Communication to the European Parliament and the Council on structur-

The European Commission submitted its 'eLearning' report in May 2000 as a contribution to the development of a strategy and a timetable of actions on education and training for the new knowledge-based economy. The Commission proposal contains a number of objectives, together with a timetable for some of them. The objectives cover three domains: infrastructure, increasing people's level of knowledge and adapting education and training systems to the knowledge-based society.

The following aims figured prominently among the objectives:

- to provide every school in the EU with Internet access by the end of 2001, and to offer multimedia resources in the classroom;
- to set up a trans-European high-speed network for scientific communication linking research centres, universities, technical libraries, and in due course, schools, by the end of 2001;
- to train a sufficient number of teachers in the use of the Internet and multimedia resources by the end of 2003; *and*
- to ensure that all pupils are 'digitally literate' by the end of 2003.

QUALITY INDICATORS



The idea of a report on the quality of schooling goes back to the Conference of Ministers of Education of the European Union and the applicant countries in Prague in June 1998. However, the guidelines that were adopted by the Heads of State in Lisbon in March 2000 provided a definite boost to the idea, the first of its kind, which sets out to provide a reference framework for the various education systems. Sixteen indicators were selected by a group of experts chaired by the Commission.

At present, these 'information indicators' do not allow any judgements to be made, because of the wide range of structures and education systems and the shortcomings of some of the data. Eventually, they should develop into 'evaluation indicators' that will lead to a benchmarking policy and a calibration of performance using various pointers. A recommendation is in the pipeline for a common methodology for assessing schooling along the lines of a recent similar recommendation dealing with higher education.

The 16 quality indicators cover four domains:

- **attainment**, i.e. the level achieved in mathematics, reading, science, information and communication technologies (ICT), foreign languages, learning to learn and civics;
- **success and transition**, i.e. dropout rates, completion of upper secondary education and participation rates in higher education;
- **evaluation and steering of school education**, meaning a transparent system of evaluating schooling and the involvement of parents in decisions concerning schools and their children;
- **resources and structures**, i.e. length of teacher training, participation rates of 3-to-6-year-olds in pre-primary schooling, number of pupils per computer and expenditure per pupil at the various levels of education.

The scope of the report has been hampered, however, by a number of shortcomings, affecting both the actual data and their comparability. In the case of the data, there are four kinds of shortcoming:

- **low level of exhaustiveness**, with only three indicators covering all 26 countries involved;
- **lack of data for some indicators**, such as foreign languages, learning to learn, ICT or civics;
- **lack of data freshness**, with some of them going back ten years;
- **difficulty in taking account of the specific features of the various education systems.** The report also identifies some obstacles to data comparability, including different priorities depending on the subject, different learning contexts depending on age and level, methods, structures and linguistic and cultural backgrounds.

al indicators. These indicators should assess quality with a view to providing each citizen with adequate information.

"Students and parents have the right to choose adequate teaching. Awarding medals is not what is necessary; we are not in a race. Instead, we need to provide consumers with information to help them with the choices available.

"Any employer will of course be more likely to hire someone who is better trained in terms of language ability, scientific background, professional skills, and so on. Since we are living in a Europe where there are no longer any frontiers for goods, services, capital or even people, being born in one place rather than another should not be a handicap for anyone."

What are the main weaknesses of the indicators that you now have?

"You could say that we are the poor relation in comparison with other statistical fields. There is a tremendous amount to be done, especially at Member State level where statistical systems need to be adapted in this field, and this is becoming vital.

"The Council of Ministers of Education is, in any case, required to make an annual report to the European Council on the progress achieved in adapting education systems to the knowledge-based society and in referencing education systems by means of benchmarking. The next report is scheduled for the Stockholm European Council in March 2001. We need to get our act together and get on with it."

Where do you stand with Eurostat and Eurydice in setting up this new statistical tool?

"Let me say right away that collaboration with Eurostat is excellent. We are working together with the help of the 'Eurydice' network on developing a set of indicators to provide an accurate picture of each country's education system and on devising common standards and definitions as, for example, reducing the number of pupils failing to complete secondary education.

"I hope that the Commission in general, and Eurostat in particular, will accord this new field all the importance it deserves, since we need to make a tremendous effort to catch up with other statistical fields.

"Eurydice is a European information network on education consisting of national offices run by a unit at the European level. This network has built up a large amount of information on education systems and created a database. In addition, Eurydice and Eurostat together publish *'Key Data on Education in Europe'*. The data provided by Eurydice essentially highlight the qualitative aspects of the systems. Therefore, Eurostat and Eurydice complement each other to an optimum level."

My last question is to ask Mr Lenarduzzi to say something about lifelong education and training, a subject about which he is clearly passionate.

"We all know that the society of the 21st century will be a knowledge society where knowledge will be vital for one's integration in society and well-being. We need to put the appropriate tools in place to enable everybody to participate in lifelong education and training. This has to be done formally, within the education systems, but also informally, since school is not the only place where you can acquire knowledge and skills.

"Hands-on experience provides skills that can be compared to any learnt in the classroom. Similarly, people can teach themselves if they know how to use their computer, by means of the Internet or by using interactive CD-ROMs. Knowing how to make the most of these informally acquired skills and knowledge is also a question for the future.

"It will be a future in which people can no longer be content to play a passive role. They will need to take responsibility for themselves and find the motivation to learn new skills. It is therefore up to society to provide people with the means of acquiring these skills. This is one of the key challenges of the information and knowledge society." ■

Eurydice

Set up in 1985, the Eurydice education information network has been part of the Socrates Community action programme since 1995. Comprising national representatives from 29 countries (EU15, ten Central and Eastern European countries, three EFTA countries and Cyprus), Eurydice is an observatory with the primary role of producing descriptive analyses and comparative studies and of compiling indicators on systems of education and national education policies. The 'Eurybase' database contains information on the various education systems in Europe (http://www.eurydice.org/Eurybase/Application/eurybase.htm). Eurydice also publishes studies and reports, including *'Key Data on Education'* in conjunction with Eurostat.

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1) Socrates: cooperation programme in the area of education
2) Leonardo: cooperation programme in the area of vocational training

Sigma's BARBARA JAKOB met **HUBERT CHARLIER**, responsible for labour market statistics at Eurostat's E1, to talk about the future of employment statistics against the background of a strengthened European Social Policy that is stressing the interaction between economic, employment and social policy.

EMPLOYMENT STATISTICS in a state of constant change

When talking about employment statistics one cannot avoid referring to the extraordinary European Council of Luxembourg in November 1997 aimed at fostering employment in Europe. At that meeting, indicators, both qualitative and quantitative, were defined as being key to monitoring the achievement of a set of political objectives, the so-called employment guidelines.

More important for statisticians than the increased workload deriving from this process was its contribution to clarifying statistical needs. A concrete and constructive dialogue started between Eurostat and the Commission's Directorate-General 'Employment' in charge of following up the employment guidelines. It was up to politics to formulate the guidelines, up to politics and statistics together to choose the appropriate indicators and up to statistics to make the indicators available.

'Anticipating Lisbon'

The fact that the focus after Luxembourg switched almost completely to employment makes it much easier now to meet the requirements deriving from the European Council's special meeting in Lisbon. This stressed the needs for a more coherent and systematic approach to economic and social policies and then invited the Commission to produce an annual progress report on the basis of structural indicators.

"With employment policy and statistical indicators we are increasingly aware that we are quite in advance of other domains which are growing in importance after the Lisbon summit in March 2000. Discussions on how to fulfil statistical requirements, which indicators to provide, and which concepts these should be based on are just getting underway in other fields, but have already been finished for employment statistics", says Hubert Charlier.

"A large part of the indicators for the follow-up of the employment guidelines will also serve as structural performance indicators in the so-called 'benchmarking exercise' now required after Lisbon."

A logical consequence

Lisbon can be seen as a logical consequence to Luxembourg. Whereas political consensus initially limited the social policy area to employment, its scope has now widened and looks at the interactions between the economy, innovation, employment and social cohesion.

The way to quality

When asked to judge the set of statistical information on the labour market and employment against the background of the new demands arising from Lisbon, Mr Charlier refers to Eurostat's quality criteria – clearly not just a theoretical concept for him.

"There are frequently complaints about *timeliness*. I would not say this is justified for unemployment. We publish unemployment rates every month within five weeks of the reference period.

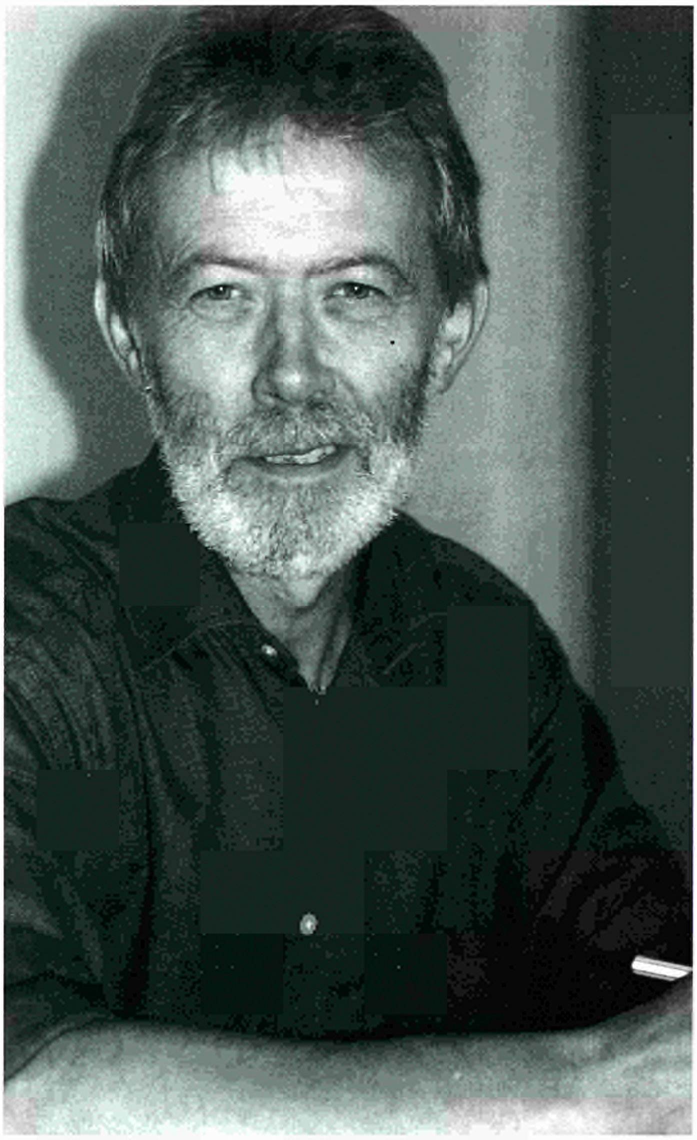
"The lack of timeliness is true, however, for the evolution of employment. These data should be available within three months as part of the quarterly national aggregates, but they are not.

"And it is certainly true for labour costs, an important element for the management of monetary policy by the European Central Bank (ECB). The US Bureau of Labour Statistics provides quarterly data on labour costs within one month of the end of the reference period. We hardly get unharmonised data from part of the Member States after three months", Hubert Charlier admits.

"Even the structural labour costs data, based on two surveys every four years, do not arrive on time. The corresponding Regulation provides for a delay of 18 months after the reference year has ended – quite a long delay, in fact, but not respected by all Member States. One of the weaknesses *are* these delays", he summarises.

Progress is expected on more up-to-date employment data from the Labour Force Survey, which is in the process of being transformed into a continuous survey, switching to the production of quarterly data. But this transition will still take some time with Germany not planning to undertake it before 2005.

Labour costs, and particularly the working time data needed to calculate and compare the labour costs per hour worked, worry Charlier also in terms of their *comparability*. The economic activities covered, the concepts used for hours worked and labour costs differ between Member States, which means the hourly labour costs are hardly comparable.



A Belgian, Hubert Charlier has worked at Eurostat for the last 25 years in various positions and statistical fields. Since 1994, he has been head of the unit in charge of 'Labour Market' statistics.

Diverging but not contradictory

"Unemployment statistics are less of a problem in this respect", Mr Charlier explains, "although it seems to be hard for the public to understand that diverging unemployment rates published by national administrations and by Eurostat are not contradictory."

Unemployment rates published nationally are generally derived from administrative information about the number of registered unemployed. "That makes sense, the administrative data are accurate and quickly available", Mr Charlier says.

The only disadvantage is that they cannot be used to compare unemployment levels between countries. The underlying systems for administrative information are based on social welfare or other administrative provisions such as the rules for unemployment benefits. These vary widely from country to country, which makes administrative statistics a perfect source for monitoring short-term trends in one country but absolutely unsuited at the supra-national scale. Unemployment rates may look completely different for one country depending on whether they are based on registrations in national public employment services, or on the ILO concept used by Eurostat.

Hence, the European Labour Force Survey (LFS, *see panel on the following page*) is needed to provide the necessary data on the European scale. The unemployment concept used by Eurostat is not only agreed by all EU Member States, it also follows the recommendations of the International Labour Office (ILO). The concept has been further refined and the definition decided on; it is now the object of a Commission Regulation[1].

The remaining problems with unemployment data are:

- The Regulation just mentioned will only be fully implemented in all Member States in 2002; in the meantime and from January 2001 onwards, any differences will be documented.
- Even when a continuous Labour Force Survey is implemented, the monthly unemployment estimates available within one month will still be based on recent registered unemployment data.
- The same problem affects regional (or infra-regional) unemployment rates even if some techniques are now being studied to improve reliability of Labour Force Survey results for small areas.

Consistency, another requirement for quality, is a problem frequently discussed by labour statisticians. "We should endeavour to reconcile the data coming from different sources", says Mr Charlier, "although this is proving to be difficult.

"With the change to the European System of National Accounts, ESA 95, we

Source of a wealth of data

The Labour Force Survey (LFS) is not just an average survey providing labour market data. It offers a wide variety of comparable information on relevant labour market aspects across all sectors of the economy and on labour market characteristics normally not available from other sources.

The possibility to introduce ad hoc modules to the main questionnaire enables specific topics to be analysed: transition from school to work in 2000, working time and working arrangements in 2001, employment of persons with handicap in 2002, life long learning in 2003.

The LFS is based on a sample of households. The information collected is not confined to people in the labour force, i.e. the employed or unemployed, but involves all people in a household. The wider coverage associated with labour force surveys therefore allows the effects of the labour market to be assessed in a household or family context.

The general methodology, the definitions used and the practical implementation of the LFS, carried out for the first time in 1960 by the then six EU Member States, have continuously evolved to keep up with changing conditions and information requirements.

The legal basis for the LFS is Council Regulation (EC) 577/98 on the organisation of a labour force sample survey in the Community. It lays down a target structure for a continuous survey providing quarterly data with the possibility of exemption for those Member States "not in a position to implement a continuous survey". Until 2003, all EU Member States, except Germany and Austria, will have introduced it.

Because of its design as a Community survey and the possibility to make use of micro-data, the European Labour Force Survey offers a wealth of comparable data for Europe.

More information on methodology is provided in the publication 'Labour Force Survey, Methods and Definitions' *(CA-19-98-536-EN-C).*

made some progress. As for the LFS, the ESA 95 employment is based on the ILO definition, which was not the case with the ESA 79. However, a difference remains between this and the concept of employment used in the business surveys."

A more flexible labour market

More concretely, the problem concerns part-time, full-time and casual employment. "Until a few years ago, employment consisted mainly of full-time employees and full-time self-employed. Today there is a growing share of part-time employees, people working as employees with a self-employed status or people employed on a casual basis such as students", says Hubert Charlier. "Business statistics and social protection systems do not always identify these different groups properly. With greater labour market flexibility and new forms of employment, the ILO concept on the one hand and concepts used in business statistics and social security on the other, risk becoming increasingly divergent."

The most visible quality criterion, and the one that interests politicians most, is probably *comprehensiveness*: Do available statistics generally cover information needs?

Whereas Mr Charlier regards the supply side of employment well covered in terms of information on the active population etc (mainly due to the LFS micro data), he recognises there are some gaps on the demand side, in particular concerning the skill gap. "A proposed job vacancy survey informing about the demand for labour by enterprises is envisaged and pilot surveys will be launched next year.

"A second area in which we noticed gaps is the level of detail by activity", Hubert Charlier continues. "The Labour Force Survey, as a sample survey, is not representative enough to correctly measure employment in very small sectors. When we want to answer questions with this level of detail we have to go back to business statistics or administrative statistics. On the other hand, these statistics seldom allow a breakdown by gender, age or qualification."

Another question that statisticians have difficulties answering, is the question of employment in sectors that are not compatible with NACE (Nomenclature of Economic Activities of the European Communities).

"More and more often we are asked questions about employment in, e.g., the social economy, research and development, culture, the public services or in the environmental sector. These are areas that are not identified as such in NACE. To answer these questions, we have to start fishing around in different areas of NACE, where we assume that there is a large proportion of the activity in question.

"This is a difficult problem, indeed. One solution would be to collect the data in the LFS on a more detailed NACE level. The aim would not be to publish data in such detail but rather to enable us to aggregate the data in a more flexible way. It is the only solution foreseeable for this problem if we are to avoid specific surveys."

Quantity and quality

'Quality jobs', a concept put on the agenda by the Lisbon Council, is highly interesting, in particular for an EU-USA comparison. Eurostat has, together with the relevant people in the Commission (and also with the ILO and OECD during a recent seminar in Geneva) started a process of reflection. "It is more a conceptual question than a problem of availability. The term 'quality jobs' encompasses many different aspects, starting with salary levels, workplace safety, the duration of contracts, training, career possibilities and many other things, even down to employee satisfaction. With the exception of the latter, we have some data on all these issues."

A last important gap identified lies in salaries and labour costs in the area of services. The structural surveys are incomplete because they only partially cover the services sector. "This is very unsatisfactory, in particular because it distorts the comparison of salaries between women and men. Major services areas in which women are widely represented, such as health and education, and where salary disparities tend to persist, are not covered in the survey."

The regulation on labour cost surveys provides for progressively integrating the services sector into the survey but there is no precise deadline. It is a more general problem touching all business statistics. The feasibility of extending the field of business surveys to services is now being studied through pilot surveys in the framework of a Council Regulation on structural business statistics. "We will need to take a long breath until this problem is resolved", Hubert Charlier comments.

Going new ways?

Information on labour costs seems to be rather tricky since it poses problems in terms of timeliness, comprehensiveness, comparability and quality in general. "It is however of major importance for the management of monetary policy by the ECB with the current 11, but in the future 12, 15 and even more countries taking part in EMU, we can no longer afford to wait for data to come in from all countries before calculating vitally important short-term statistical aggregates.

"We have to think of European-wide surveys with all their advantages and disadvantages. Certainly, a sample representative on the European scale would no longer deliver national data in detail, as is currently the case. But, after all, there is no longer national monetary policy to consider but euro-zone monetary policy with its own requirements for rapidly available data for this area.

"A European Labour Price Index designed as a European sample survey would have the advantage of providing data more quickly and it would reduce the burden on enterprises since the sample would be smaller than at present. In addition, the data would be fully comparable and the method used to estimate them fully transparent which is important for credibility. These reasoned and cost-cutting arguments should help convince Member States.

"With the support of National Statistical Institutes (NSIs), we should also be able to overcome a technical obstacle, which consists in building up a European sample for the first time. The reason for this is that company registers are currently held within NSIs."

The USA benchmark

In the course of our conversation we always seem to come back to a comparison with the USA. "With monetary union the USA benchmark always arises as soon as we start talking about indicators of special importance for the ECB", Hubert Charlier states.

"And when people ask why Mr Greenspan of the US Federal Reserve Board has labour cost information at his fingertips after one month whereas Mr Duisenberg has to wait three months for inferior data, we are well able to explain the reasons, but we can hardly justify them. Benchmarking with the USA will become even more important in the future." ■

1) Regulation 1897/2000 of 7 September 2000, Official Journal L 228, 08/09/2000 p.18.

The European Labour Price Index – a true price measure

The ability to identify the price elements of labour costs has important applications in key policy areas. Because a labour price index is not affected by changes in the quality or quantity of work, it provides an insight into employment practices which cannot be found from existing measures of costs or earnings.

When an employee and employer agree on a contract of employment, both parties are signing up to a set of labour prices applicable to a transaction of labour. The agreed rates will tend to reflect the labour market conditions at the time. The prices will often include longer-term commitments provided by the employer in return for continued labour, e.g. fixed annual increments in salary, retirement pension, sickness and other benefits. Any change in these commitments constitutes a price change – a price change that a labour price index is designed to measure.

The key feature of a labour price index is that it maintains a clear distinction between changes in price and changes in quantity or quality – it is a measure of pure price movement.

Monetary policy

A labour price index is one of the indicators that can be used to monitor wage developments and to identify inflationary pressures caused by wages. Because it covers total annual labour costs, it is possible to separate out price movements not just for wages, but also for other employer costs such as social security contributions, annual bonuses and other benefits. The index can also reflect any price changes that are due to take effect during the coming year, if any such changes are known in advance, and as a result can offer an early indication of future price movements.

Economic policy

In economic policy, a labour price index provides a measure of labour cost trends that can be used to assess competitiveness. National labour price indices, calculated on a consistent basis, would enable the growth rates for different elements of the labour costs to be compared between Member States; a European Labour Price Index would provide important comparisons with the Employment Cost Index in the United States, which has been published since 1976 and which is released within 30 days of the reference quarter.

Employment policy

The index can indicate changes in labour costs by occupation and by industry sector and can be used to evaluate the implementation of employment strategies relating to labour costs, e.g. strategies aimed at reducing the non-wage labour costs of low-paid or unskilled workers (Employment Guidelines 2000). With national labour price indices for EU Member States, it would be possible to examine the influence of labour prices on the free movement of labour around the EU. In the United States, the index is used in negotiating wage levels and as a cost escalator for labour contracts.

Sigma's GLEN CAMPBELL spoke to **ANTONIO BAIGORRI**, Head of Eurostat's 'Living conditions' unit. He explains the ways in which the unit will meet the new challenges posed by current EU Social Affairs policy.

"No stones unturned... nor unpolished"

Social Affairs in EU policy is gaining in importance particularly since the entry into force of the Amsterdam Treaty and the March 2000 Lisbon Council. Given the boost to social issues, it looks like you will have your plate full. Will you manage with all the increased data demands placed upon you?

Indeed, the Commission's Social Exclusion Action Programme (2001-2005) which takes up the requirements formulated in Lisbon refers frequently to the role of statistics playing an active part in policy-making. The overall aim of the programme is to encourage co-operation which would enable the Union and its Member States to make a decisive impact on the eradication of poverty and social exclusion as measured by targets agreed by the Council of the European Union.

The programme requires the analysis of characteristics, causes, processes and trends in social exclusion using harmonised methodologies. This calls for further development of comparable statistics in Member States and at the Community level in close co-operation with Member States.

With almost a dozen years of Eurostat experience, time spent in regional statistics, price statistics and almost three years in social statistics, **Antonio Baigorri** has also worked in the public service and as university professor in statistics and econometrics home in Spain.

Since 1998, he has headed Eurostat's unit 'Living Conditions', responsible for data relating to social protection, labour market policy, the ECHP (European Community Household Panel), HBS (Household Budget Survey), Time Use Surveys, equal opportunities, consumer protection, income, poverty and social exclusion.

No less important are the new demands on social protection. The Lisbon Council made social protection a domain to be subject to the new open method of co-ordination at EU level[1], which will imply the development of specific statistical indicators.

All these initiatives call for high quality statistics and will impact upon the development of new methods and alternative sources (in particular administrative registers) for data collection.

Work is underway to equip ourselves with the necessary instruments so that we can effectively respond to these new data requirements. Overall, very few stones remain unturned. Financial resources are encouraging and we hope to be able to meet our needs for increased human resources.

The many faces of poverty

The monetary concept of poverty defines as 'poor', people whose 'equivalised' income is less than 60% of the median national (equivalised) income. In this concept, the income of the household as a whole is converted into amounts per 'equivalent adult' by taking into account the household's composition. Thus, for example, a sole family breadwinner who does not necessarily have a low personal income, might well have a low 'equivalised' income and fall below the 'poverty line' if considered in the family context.

If we are to measure social exclusion and not simply monetary poverty, we need to take into account not only income but also other factors. 'These so-called non-monetary indicators need to be carefully selected. They can help policy-makers eliminate the contradiction, for example, of economic growth hiding the stagnant and isolated condition of the poor.

In the European Community Household Panel (ECHP) survey, questions cover in detail all income sources as well as living conditions in general. While some questions are addressed only to the family head (general household's financial situation, ability to meet basic needs, housing conditions and the possession of certain durables...), others are asked to everyone in the household aged 16 or over (employment situation, health, social participation...).

Defining poverty wholesomely

Why has agreement on the measurement of poverty been so fraught with difficulties?

Poverty is a complex, multidimensional phenomenon and is therefore difficult to measure. The currently used concept of monetary poverty is restrictive since it takes into account only the monetary income received by the household and its members.

In view of this, we are also working on linking this purely monetary definition with non-monetary indicators, such as dwelling characteristics, social participation, health and so on – thus extending the concept to what is now referred to as 'social exclusion'.

Eurostat has already published some analyses using this methodology. However, in measuring poverty, important difficulties still remain. For instance, the difficulty to assess accurately the monetary income of the self-employed, the lack of coverage of some important sub-populations (homeless people, immigrants...), and so on.

Defining income clearly

The concepts of income and earnings from work have also been the subject of discussion and also confusion. How can this be made clearer?

The concept of income is of particular importance since it is the reference for reporting on poverty. It is quite complex given that it needs to register all the money received from work, social transfers in cash and property. Following international recommendations, it also needs to include non-monetary components, i.e. benefits received in kind and imputed rents. It is therefore much wider than just salary or wage.

We have devoted much time on how to best approach this concept. The Canberra group, bringing together experts from many different countries also beyond the EU, is reflecting on the way to apply this extended definition of income at the household level, with the aim of reconciling macro (country) and micro (households and persons) levels. An outcome from this will be a handbook in 2001 to harmonise all the concepts making these complexities clearer. Of particular importance is how it will facilitate better analysis of social exclusion and poverty.

Overhauling the ECHP

One stone, or rather rock, very much being turned and reworked is the ECHP survey (European Community Household Panel) – the only harmonised source on income and living conditions. Why do we have to change it?

The first thing to say is that the ECHP has, so far, proved to be an invaluable source of information on income and living conditions. Also its implementation has been a unique and worthy experience for Member States and Eurostat. However, the situation in 1994 when the ECHP was launched is no longer today's and we are confronted with new data requirements needing timely delivery.

In order to satisfy today's calls for social data, we need to foster the development of a new instrument providing harmonised, detailed and robust income data and one that is the reference source for living conditions and social exclusion analysis. It should provide high-quality cross-sectional data, also by bigger sample sizes. A special approach has to be defined to respond to needs for longitudinal (panel) data.

In order to hit this ambitious target, the new instrument will have to meet three key conditions: it will have to be anchored within all 15 National Statistical Systems, to be flexible and to allow the use of various data sources while ensuring timeliness. Flexible data sources should help anchor the instrument in national systems and thus improve timeliness. The new instrument will be launched in 2003 and we want it to be the EU reference tool for statistics on income and social exclusion.

Still on the ECHP, the notion of 'timeliness' is now common currency, but is there not a danger that the need for rapid data delivery could win over the benefit of having a rich data bank offering other possibilities for analysis?

I think that if there is streamlining, it will be in the direction of longitudinal analysis and not in the number of topics covered. With timeliness of results becoming a priority, the longitudinal dimension of the new instrument will need to be carefully reconsidered, balancing the pros and cons of the different options in a context where the rapid delivery of high quality indicators will be paramount in both the national and European statistical systems. The same logic will have to be followed when analysing the importance of the need for regional indicators in the area of income and social exclusion.

More social protection figures

Let us now turn to the other challenge that you mentioned at the beginning of this interview: the new demands on social protection. Statistics in this area are said to lack detail. What will be improved?

It is important here to keep in mind that statistics on

Today's European Community Household Panel (ECHP)

At present, the ECHP is a survey based on a standardised questionnaire that involves annual interviewing of a representative panel of households and individuals in the Member States, covering a wide range of topics such as income (including the various social transfers), health, education, housing, socio-demographic and employment characteristics, and so on.

An international approach is also vital if our statistics are to be compared with data relating to different world regions for our policy makers, particularly in the light of globalisation and World Trade Organisation (WTO) agreements.

The longitudinal structure of the ECHP makes it possible to follow up and interview the same households and individuals over several consecutive years. The first wave of the ECHP was conducted in 1994 in the then EU12, based on a sample of some 60,500 households (roughly 170,000 people). Austria joined the project in 1995 and Finland in 1996. Sweden does not participate.

social protection are quite different from those used for poverty and social exclusion. The latter are indeed based on sample surveys, whereas the former come from administrative registers and are provided only in an aggregated format.

Having said that, the EU statistical system in social protection is known under its acronym ESSPROS, which stands for 'European System of Integrated Social Protection Statistics'. It is based on a methodology for social protection statistics that has been developed by Eurostat together with Member States.

ESSPROS includes a core system and modules. The core system corresponds to the standard information on social protection receipts and expenditures published annually by Eurostat, the modules contain supplementary information.

The subjects covered by the different ESSPROS modules are determined on the basis of the needs expressed by the Commission and Member States. Modules on the number of beneficiaries and qualitative information by scheme and detailed level benefits are being implemented. The Commission has expressed the need for the development of a module on social protection net expenditure and a specific task force was therefore set up which will decide on the exact scope of the module.

A Community database on Labour Market Policy (LMP) measures has been developed as an ESSPROS module. The new database includes data on beneficiaries and public expenditure on labour market policies, particularly active measures. In April 2000, the first full data collection was launched. The classification typology developed within the LMP methodology is included in the work of the Commission to create comparable indicators to monitor Employment Guidelines.

Polishing other stones

Are there any other domains also set to grow or be reworked?

Yes, the 'Living conditions' unit is also responsible for the household budget and time use surveys, for consumer protection and gender statistics. In the future, the different surveys will be re-focussed and streamlined. There will be a better division between the various areas of social statistics: the Labour Force Survey for employment and labour market data, the new instrument to replace the ECHP for income and social exclusion, and the Household Budget Survey (HBS) for expenditure.

The HBS is already used for calculating weights for price indices and in national accounts. In the social domain it is used for establishing expenditure patterns. Thus, we hope to extend the consumption element of the HBS to integrate the Commission's consumer protection policy where there are increasing demands for data.

Time Use Surveys (TUS) complement other social surveys. They are particularly useful for collecting information on time spent on activities such as paid and unpaid work, caring for others, leisure, transport and so on. They are a unique source for gender statistics. Eurostat concentrates work on elaborating the methodology and more than half of the Member States will implement the survey in the near future.

The Commission's Framework Programme on Gender Equality states that there is a growing need for statistics to evaluate equal opportunities policies and monitor implementation of certain guidelines, for instance on gender mainstreaming, tackling gender pay gaps, reconciling work and family life, and facilitating reintegration into the labour market. This also includes the development of indicators and benchmarks. We are now working on a future publication that will cover gender issues in several areas such as employment, earnings and income, education and training...

Teamwork

Because social data touches on so many different domains, collaboration with other departments and organisations ensures the reliability of your statistics...

Yes, we work with a large number of colleagues in Eurostat and other Commission's Directorates-General dealing with social exclusion, employment, gender issues, consumer protection, national accounts, satellite accounts, prices, transport and so on.

In addition to national statistical offices, contacts with the OECD have been intensified in the last two years and will doubtless continue to grow. Also, we have built partnerships with the Canberra and Sienna groups. While the Canberra group's work is focussed on income, the Sienna Group's *'raison d'être'* is to improve social statistics more generally – particularly the development of social indicators and statistical systems.

Confident that Eurostat will be well placed to produce the social statistics required in the years to come, Antonio Baigorri looks forward to the growth of social data ahead for policy-makers and users alike. He is already anticipating the fruits of, among other things, the overhauled ECHP in 2003 – the pickings will certainly be relevant for our new millennium's living conditions. ■

1) Open policy co-ordination involves establishing policy guidelines, setting benchmarks, concrete targets and a monitoring system to evaluate progress via a peer group review.

As part of the efforts to dynamise the EU's economies, the Lisbon Council put education higher up the agenda making 'lifelong learning' – including the modernisation of education systems and digital literacy – EU priorities in the years to come. To find out more, *Sigma*'s GLEN CAMPBELL spoke to **MICHAIL SKALIOTIS**, head of Eurostat's unit for education, health and other social fields.

LIFELONG LEARNING for education statistics

'Lifelong learning' is today's umbrella term for EU education – 'from cradle to grave' – i.e. all ages – and attempts to cover not only formal education but cultural and societal integration too. The move is towards the learner in the centre for active participation in the labour market and civil society.

Although 'lifelong learning' has been discussed for some 30 years, it is only now that the concept has shifted to the policy-making stage. This explains why, up until recently, statistics and indicators on education were only able to rest upon the logistics of the education and training systems and the labour force. The possibilities for tomorrow's education statistics in the context of lifelong learning abound.

Michail Skaliotis, from the town of Kalamata in Greece, studied Economics and Business. Completing his MBA in Leuven (Belgium), he passed the Commission's open competition and has now clocked up 20 years at Eurostat. Working in labour market statistics for a decade, he has become a fervent user of these data working in education and training statistics for the last ten years.

Education data expands

Is education data keeping up with policy developments?

The range of statistics on learning collected at the European level is now very wide growing not only concomitantly with, but also in advance of the EU's policy interests. We should not forget that only recently, after the Amsterdam Treaty, education policy has become one of the EU's competencies.

Today's data cover pre-primary through to tertiary education, extending to areas such as languages, foreign students' exchange programmes, special needs, teachers, education expenditure and so on. The educational attainment of the population, the social and economic returns, as well as the role of the social and economic background of learning are also covered.

Clearly, the scope of Eurostat data collections and surveys will grow as a result of the EU's current ambitions in the fields of lifelong learning and digital literacy. Already, the major reference for EU education statistics, *'Key Data on Education in Europe'*, apart from covering other new indicators, now devotes a whole chapter to information and communication technology in education systems.

Careful expansion...

In the context of Lisbon and lifelong learning, policymakers have decided on the priority areas of lifelong learning and the indicators have, in fact, been defined.

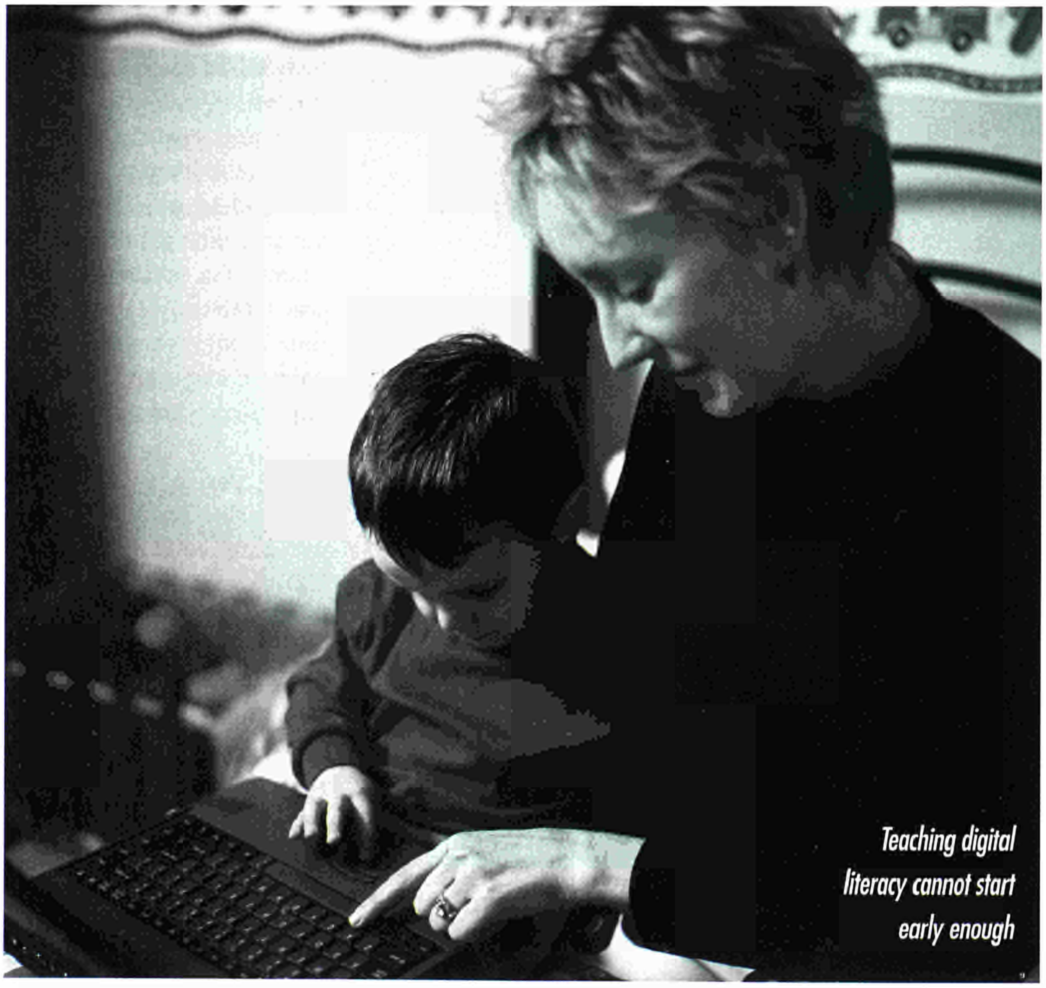
Now it is necessary to bring the policy needs into operation in terms of indicators, check the availability and validity of data required for these indicators, calculate and test them and only then define some reference levels (benchmarks). But it should be borne in mind that there is a risk of using indicators for benchmarking without going through this process. Therefore, it is paramount that the skills expected from the EU's education systems be agreed before we use available information and indicators for benchmarking its educational systems.

Education and training accounts

Why did the project on education and training accounts run into difficulties?

We carried out a project on education and training accounts but by the time we could deliver the results, classifications had changed. It remains a priority as it offers a consistent framework facilitating the cross analysis of statistical data on education and training.

In addition, it needs to be updated to take into account changes in the ISCED (International Standard Classification of Education) levels and the LFS (Labour Force Survey), UOE (UNESCO, OECD and Eurostat) and VET (Vocational Education and Training) questionnaires as well as the forthcoming results for the second CVTS (Continuing Vocational Training Survey).



Teaching digital literacy cannot start early enough

Prepared for the test

Will you be able to fulfil Lisbon's expectations from your current working programme?

We have adapted our work programme accordingly. However, it is more a question of co-ordination of all relevant statistical work with various Directorates-General of the Commission and EU agencies. Our current system will be able to answer the most important actions following Lisbon, but not all; our team is small – outsourcing aside. In terms of quantity, we can meet a certain number – but what we are trying to ensure is that we meet the priorities.

"Lisbon is at the centre of our work"

Of course, there are some areas where we can do better. For example, I believe we could economise on routine standard data collection from administrative sources (like the UOE and VET data collections) and save resources here – contracting out work on an ad hoc basis. This would liberate us for concentrating on tasks linked to the highest priorities, which is providing statistics for the knowledge-based society.

Human capital accounting

The Lisbon Council also refers to investment in human resources, could this become an indicator?

It is something that we should be looking at. The idea is to reach a stage where human capital is treated like any other capital investment. Businesses could produce an annual statement of human resources similar to an accounting balance sheet. Realising that it can affect their market value, some Nordic companies have already started this. Indeed, we have volunteered to begin a pilot exercise in our unit in which we would like to look at the skills available in the unit, and then compare them to the skills required.

But translating this into a large-scale survey is a heavy operation for which we would need legislation. It is also problematic because it can be regarded as confidential information and even used against companies in terms of take-overs and market competition. However, if we want to anticipate a little in our work – not always running behind policies but in front of them – this is a prime example.

A palette of different surveys

Your data come from a number of surveys. Aren't there disadvantages and advantages in this system?

We use a range of surveys that provide information on the individual or the education and training system. Generally, we have developed a very effective ad hoc approach using modules where we can find a fitting home in existing surveys. The different sources answer different questions, each having its pros and cons.

For the individual, the LFS, the European Community Household Panel (ECHP) and the International Adult Literacy Survey (IALS) provide fertile ground. On education and training systems we turn to the UOE questionnaire and the initial VET survey, while the CVTS gives us information on enterprises as trainers of their employees.

The LFS is undoubtedly our most frequently used tool. For example, given the limitations of the information obtainable from existing data on transition from school to work, an ad-hoc module of questions within the LFS for 2000 was created. This will collect more detailed data from respondents in or shortly after the 'transition'. Furthermore, a module on lifelong learning (LLL) will be included in 2003.

Regarding the ECHP, we need to tap the possibilities of this survey much more – despite the apparent weakness of its size compared to the more robust LFS. Since the new ECHP will focus more on living conditions and social exclusion, there is obviously a home here for issues related to education and learning in the information society and in the knowledge economy.

While the advantages are principally choice of sources according to the policy question, the disadvantages should not be forgotten. Not all surveys produce data concomitantly. The degree of coverage diverges – the LFS dwarfs the ECHP. There are different time delays and results – LFS is faster than CVTS for example.

However, in the LFS some information is not always reliable because respondents may answer on behalf of other household members.

Towards a complete survey on education and informal learning

Skaliotis believes that a complete household survey on education and informal learning of the population should comprise the following issues:

- **participation** (incidence)
- **time** spent in education and training (volume)
- **nature** of education and training (by purpose/aim)
- **source of financial support** (public, employer, self)
- perceived **benefits** (job-related, societal, personal)
- perceived **demand** (needs and interests)
- perceived **motives** (job-related, societal, personal)
- perceived **obstacles** to participation, transparency of learning offer (**information and advice**)
- self-reported **digital literacy**
- self-reported **foreign language skills**

The CVTS survey is relatively costly and heavy, posing a burden on enterprises and countries. It is impossible to cover all non-formal education or adult education through the UOE. With VET, it has been impossible up until now to assess the employment possibilities opened for VET participants.

The catalogue of shortfalls can be managed acceptably against the advantages this panoply of surveys offers.

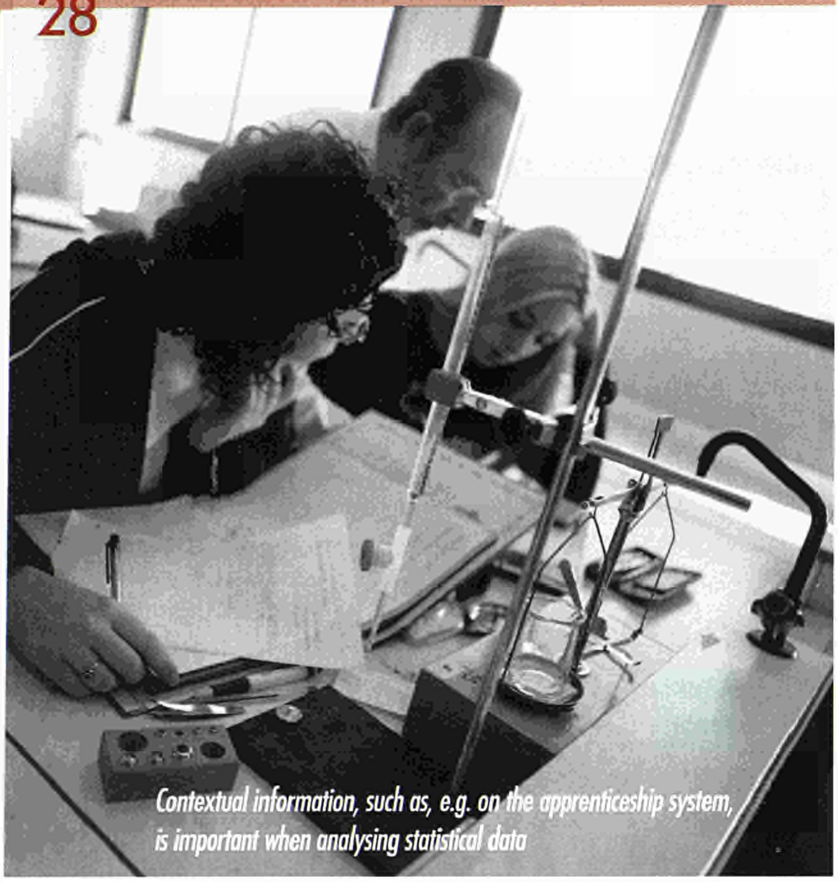
Data linkages

Is there a big demand for linking data from employment and education?

This is done already and is a necessity – and we should do more. Within the LFS we have set up an education and training module. These indicators make it possible to analyse better the implementation of employment guidelines, the practice of lifelong training and the integration of young people into the labour market. In relation to the future ECHP, co-operation is underway on the implementation of a new education and training module.

The same goes for the Structure of Earnings Survey (SES), where we have worked bilaterally with the SES team in creating the variable 'level of education' to be used in this survey. This will enable linkages to be made between income and educational levels.

And it goes beyond linking employment and education, to also social economic backgrounds and other information not in these surveys – contextual information such as, for example, how the apprenticeship system is organised, in order to understand better



Contextual information, such as, e.g. on the apprenticeship system, is important when analysing statistical data

the influence of education systems in labour market achievements. If we were looking at education and training outcomes alone, it would be insufficient because it is only part of the fuller story.

We need to look at the contextual variables. On this we work closely together with the Commission's Directorates-General as well as with EU agencies (CEDEFOP, European Training Foundation) and networks (Eurydice, etc).

If we look at the successful transition of youth, how do we understand when young people have a job? We need to allow for the different countries' systems. For example, in Germany, apprenticeship is part of the system, so for German apprentices, the transition to work happens immediately. This is why we also have to look afterwards – how long they stay and where their next career move goes.

Surveying adult education

In the context of lifelong learning and in terms of adult education, in particular, how do you foresee the development of a survey here?

The idea would be to have an adult education survey as a chain of inter-related yet independent modules. The whole of the chain could be used if the decision is to field a specific adult education survey at the European level, which would certainly be the ideal solution. However, each of the rings may also be used in different harmonised surveys to cover specific information needs.

Would this not need certain developments on the methodological front?

This certainly requires a lot of methodological work; that is why Eurostat took the initiative for the creation of a task force on measuring lifelong learning in February 2000 which is expected to make its recommendations in January 2001. Different Commission DGs as well as European agencies and networks and international organisations participate in the development work carried out in this context.

Already it has become clear that both time and money need to be invested in the different surveys including the LFS, ECHP, SBS (Structural Business Statistics) and Time Use Survey. Educational activities and content should be covered in the framework of developing information society statistics. Regarding human resource development, investment is necessary here to make it an integral part of business statistics. On the subject of cultural statistics, we are developing these with DG 'Education and Culture', UNESCO and the Member States.

We also need a more specific classification of learning activities – in particular, informal ones. This needs to build on the tools already within arm's reach: the classification of education and training fields, developed jointly between Eurostat, the OECD and UNESCO; the classification of training provisions developed under the statistical strand of the Commission's Leonardo da Vinci programme for vocational training[1]; the revision of the classifications of economic activities to extend to educational goods and services; and the development of the education part of a classification for use in time use surveys.

Moreover, on the question of a suitable measurement, if we want to measure the importance people give to learning in their life, time offers a unifying dimension. However, this concerns volume of time spent rather than the quality of learning or something such as 'quality-time'. This, therefore needs to be addressed further.

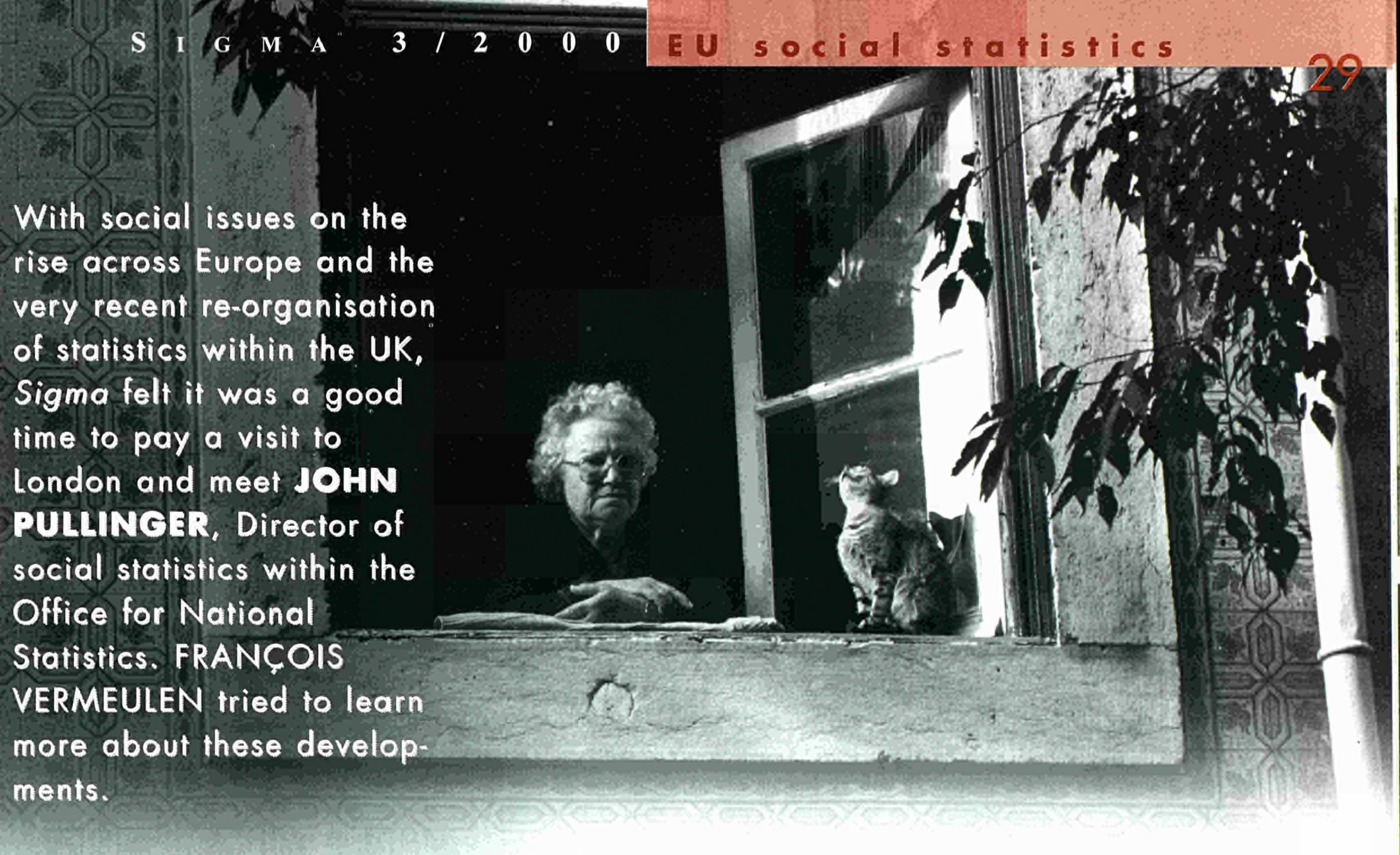
Assessing skills and knowledge

Is the assessment of skills and knowledge possible?

It seems that it is. Although the methodology is still under scrutiny, a number of large-scale comparative studies for the direct assessment of skills within the education system are in the process of being developed. To mention one, the Programme for International Student Assessment (PISA), driven by the OECD, assesses some of the knowledge and skills deemed essential for full participation in society of students nearing the end of their compulsory education. Other surveys are in the pipeline too. However, one major snag, with the exception of PISA, is that countries have to 'buy-in' and so not all EU countries are covered.

Looking ahead, Skaliotis remarks how much he would like to be a student again; the coming years look good for education in the Union. The role of education data will be vital for improving it. Indeed, it will have to be a model student! ■

1) http://europa.eu.int/comm/education/leonardo/leonardoold/stat/trainingstatis/index.htm



With social issues on the rise across Europe and the very recent re-organisation of statistics within the UK, *Sigma* felt it was a good time to pay a visit to London and meet **JOHN PULLINGER**, Director of social statistics within the Office for National Statistics. FRANÇOIS VERMEULEN tried to learn more about these developments.

INTEGRATION at work within the UK's social statistics

Official statistics are on the move in the UK and the futuristic-looking ONS building stands, in a sense, as a testimony to these changes. In his inaugural statement, on June 7, New Zealander Len Cook, the UK's first National Statistician, unveiled his agenda for change for the new entity called National Statistics. In it, Len Cook declared, "We need to address questions, rather than report surveys, which means we need to show how statistical data confirm or contradict other forms of knowledge". How does that work in the field of social statistics? Mr. Pullinger agreed to answer our questions.

Supporting policy-making

"The UK has a tradition of focusing on questions partly because of the decentralised nature of the statistical system. As a statistician based in any ministry, you are always bombarded by questions, immediate, important and political. You are also in a position to look widely to find the answers to these. The key themes in statistics are to do with supporting government policy-making.

"What is also important in the current political context is to create statistics that citizens can use to hold the government to account. Governments in the UK and in many other countries are keen on evidence-based policy-making and targets by which its success can be judged, as in the case of, for instance, teenage pregnancies, which the Government wants to reduce. Public authorities are asking for specific statistical targets and our role is to make sure those targets are monitored effectively in a way the public can trust."

Relevant, yet trustworthy

It seems statistics are becoming more aware of users' needs, be they business, the public at large or the government ...

"Clearly so, the public and the government expect more from us than just saying, 'here's the survey, the ball is in your court'. But trust is no less a concern, especially as there has been a perception of government interference in the past. We do indeed need to be relevant, but also trusted.

"UK labour market statistics have had much criticism in the past. Our response was to produce a monthly publication containing information from the Labour Force Survey, business surveys and administrative records, providing a snapshot everybody can use and feel confident with.

"Of course, we still need to report surveys properly and

Social statistics in a decentralised system

Social statistics in the UK remain decentralised. Within the ONS, they are the responsibility of seven distinct divisions, of which the first four are basically concerned with socio-economic analysis, namely the labour market, demography and health, socio-economic statistics and social and regional statistics.

The other three focus mainly on the collection of statistics: one is the population census division, a very active division at the time of the 2001 Census, another is the social survey division responsible, for instance, for the household budget survey or the Labour Force Survey, and the last one is about vital statistics, managing large databases on births, marriages, deaths, resulting mostly from the administrative collection of data. About 900 people work for the social statistics division.

The other side of the social statistical coin is found within the ministries involved in social policy, be they the Department of Health, Department for Education and Employment, the Home Office or the Department of Social Security. Each of these ministries has a statistical service performing a range of statistical functions. For example, in the Department of Health, the statistical service counts more than 100 people working specifically on statistics, in collaboration with the ONS. It produces the full range of health-related information not only through surveys, but also data obtained from the various actors in the field, like general practitioners, health organisations, hospitals, and so on.

Co-ordinating both legs of the social statistics system in the UK is achieved through the national statistics social committee, chaired by John Pullinger. In this particular field, the committee's role is to help create the new entity called 'National Statistics', launched last June.

provide information concerning statistical precision, response and non-response errors and mainstream methodologies to help people understand what the surveys are telling them. This way they can come up with answers to questions not necessarily our own. This is especially true in the world of research and business where they can use the huge amount of information we collect. Our job also consists of making that information accessible and valuable as a resource in its own right."

Data mix

With regard to administrative data, don't you think they tend to refer only to concepts that are closely linked to specific policies and lack stability over time?

"This can be true and is a frequent criticism, but this is also where integration comes into play. Integration refers to integrating data from various sources with the objective of coming out with clear and harmonised concepts, for the purpose of presenting one single coherent picture.

"Each type of data has its own strength. Survey source data provides a better chance of capturing exactly the right concept you want, internationally harmonised and consistent over periods of time. Where it can fail is in its slowness in getting information quickly – it takes time to collect – and, more importantly, its problems for analysing information by small geographical areas for which you would need extremely large surveys.

"Take for instance, the issue of social exclusion. Surveys are great in giving the overall picture, but when it comes to small groups, to small geographical areas, you have much more statistical power if you can integrate data from surveys and administrative data.

"To give you another example, take the estimates of the number of people employed in the Labour Force Survey and the estimate of the number of jobs in the economy accrued from the business surveys. If you look at these two sets of information in relation to each other, you can start to understand how people have multiple jobs, or patterns of part-time, full-time working, flexible work.

"By integrating the employer perspective – i.e. the business surveys – and the individual perspective – i.e. the LFS – you have a chance of seeing both sides of the equation. We are looking at things that would help do that, and not only at the national level.

"We are working within Eurostat's leadership group on the labour accounts to look at opportunities to integrate data from various sources, understand these and use them in combination in order to get more than the sum of its parts in terms of explanatory power."

Is there more to integration in the European context, seen from the UK's perspective?

"Our integrated presentation of labour market statistics also enables the UK's statistics to be set in the context of the rest of Europe's. Following the ILO definitions, using the LFS as a key pillar is becoming increasingly important to us. It contributes not only to Europe, but also enables our national decision-makers to understand how well the UK is doing and how it fits in with the overall changes in Europe."

And there is more to it than simply comparing things with regards to Europe ...

"The launch of the euro across economies from Ireland to Germany will need to be looked at from a social perspective. These will require social statisticians to be much smarter in describing the social situation. Whether we join the euro-zone or not, it is critical to see how the emerging economic situation in that zone is impacting on the social situation there and in the countries close to it, for example the UK."

Another emerging issue that Mr. Pullinger sees is greater attention focused on the diversity of experience across Europe. A special point of interest relates to the enlargement process and how it will affect the movement of people, how these moves will affect prosperity in both the origin and destination regions and how the people will be integrated.

Layers of integration

Integration really seems to be the rallying word of the new statistical framework in the UK. And there is more than one layer to it. For example:

- Integration means looking at information longitudinally as well as in cross sections. Only in this way can we analyse labour dynamics, keeping watch over, for instance, the risk of repeated spells of unemployment, labour outflows and inflows from an individual's perspective. This entails using records from the unemployment benefit system as well as using panel studies or LFS, whose unique design – namely, monitoring the same people for five successive quarters – also allows short period dynamic changes to be tracked.

  Although this is 'methodologically challenging' as Pullinger says, we do now have working longitudinal databases enabling the statisticians to see changes from an individual's perspective. And this is important when many of the programmes, like the new deal for young people or the new deal for the long-term unemployed, are targeted at specific individual groups.

- Integration also means looking at information from a household perspective. Traditionally, the statistical system is geared to producing the overall aggregates, headline figures, like the unemployment rate. Seeing things from a household perspective allows a better understanding of how the labour market is integrating with society; the database on households provides a vision of how many people in a single household are working, what kind of families there are, how many hours in total the members of the household work, how much income they bring in, etc ...

- Finally, integration has a geographical twist to it, both within the country and internationally. Seeing how the labour market is functioning across the European Union, but also in the USA or other OECD countries, allows the UK's experience to be situated in the broader international context.

Within the country, the same holds true, not only in the context of the devolution of power to Wales, Scotland and Northern Ireland, but also in the increased focus on small areas.

In the case of the UK, there has been a continuous monthly reduction in unemployment since 1993, even reaching close to zero in some parts of South East England. Yet, in some pockets of the country, sometimes very close to areas with good labour market performance, significant unemployment persists.

"Our challenge is to meet these emerging needs, to add these different dimensions and integrate information so that we can gain much more from what we already have", Pullinger insists.

But, there should certainly be more to it than simply adjusting existing data to existing surveys, especially with regards to the new themes of social exclusion and other social themes developed notably at the European Council of Lisbon. And indeed, such is the case.

For instance, there are new questions added to existing surveys. Since April 2000, the UK's Labour Force Survey has been given a boost funded by the Department for Education and Employment, whose primary interest was to monitor labour market and educational attainment at local authority level (NUTS 3). This will give much better disaggregated data at local level. There are also new themes, or new twists to older themes like social change, exclusion or participation, that will be covered by new surveys. Pullinger gave me two further examples of significant new initiatives.

Neighbourhood statistics

Following new budget allocations this summer, a huge programme of neighbourhood statistics will be launched in 2001 at ward level – there are some 8,000 within the UK – specifically designed to understand social exclusion, the difference in disadvantage between small areas, prosperity and poverty existing side by side and so on.

A Chinese LFS

The UK has launched a Labour Force Survey since 1992, producing a continuous quarterly survey based on ILO definitions. Since 1998, the LFS has taken a step further to produce rolling monthly estimates so that the basic labour market figures used in the UK are drawn within the LFS and meet LFS regulations, ensuring harmonisation with the rest of Europe.

What Pullinger terms as 'something really special' has been marketed elsewhere, in Russia and China, for example, in the latter case via an EU-funded programme also involving Finland. This particular programme with China has been running since 1998 and has been both 'exciting' and, sometimes, 'stretching'.

The key idea is to look at ILO definitions in the labour market to monitor economic activity in China, with the aim of helping the Chinese authorities produce an LFS, working best within their context. "There is still a way to go, but this has been a very positive project to date", Pullinger concludes.

The basic idea is to produce one single dataset for neighbourhood statistics across all social domains, education, health, etc, using data collected through a wide range of sources and from all the ministries involved. The programme is budgeted until March 2004, and the intention is progressively to improve the service and create neighbourhood information integrated with census output from 2003 onwards.

The social significance of ageing

Ageing, or rather, the consequences of ageing is another theme under consideration. Next year, a longitudinal study of ageing will be launched in a collaboration between the UK and USA. The idea is to record people's experience in the economy, engagement with the labour market and their social experience to explore what happens to the population when it ages and what the legacy will be to future generations. This new survey will complement a range of existing instruments tracking the experience of the population in later life.

I then asked Mr. Pullinger to sum up what he sees as the trends at work in social statistics.

"All the interesting issues are nowadays multi-dimensional, dealing with interaction between crime and family structure, health and employment and so on. Seeing things from an individual or a household perspective means that we have to take into account the many dimensions involved. Also, we will be increasingly looking at the experience over time of individuals and at the inter-generational consequences of what is happening. For instance, how will longer life expectancy impact on the transmission of wealth from one generation to another and how many people are in a second generation of jobless people.

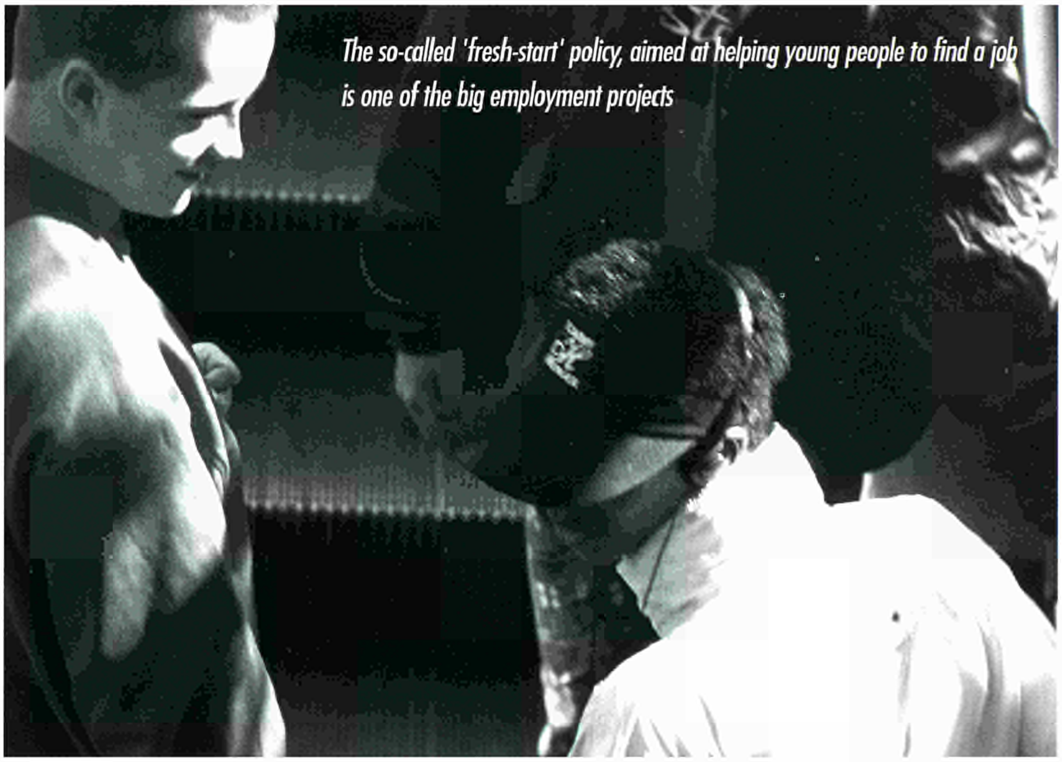
"Another point is geography. In the past, the primary interest stood at national level. Today, a lot more statisticians are involved at all kinds of levels, be it local or international.

"Finally, the issue of distributional questions like income inequalities, the gap between the haves and have-nots, whether people at the bottom are really left behind. This concerns not only income, but also health, like for instance the difference in survival rates for cancer."

In all these areas UK statisticians, working in partnership with colleagues across Europe and beyond, have a real possibility to support policymakers in delivering the agenda for social change agreed at Lisbon and elsewhere and to ensure that our citizens are well informed in the age of information. An exciting prospect for us all. ■

ANNIE FOUQUET, recently appointed director of DARES, the Directorate for the Promotion of Research, Studies and Statistics within the French Ministry of Employment and Solidarity, has declared it her ambition: to reconcile research and social policies through statistics. *Sigma*'s FRANÇOIS VERMEULEN travelled to Paris to find out more about her work.

The leverage effect of European SOCIAL STATISTICS



The so-called 'fresh-start' policy, aimed at helping young people to find a job is one of the big employment projects

Although clearly very busy, Mrs Fouquet welcomed me courteously in her office and, came straight to the point, launching into the subject by describing the external and internal leverage effects of European social statistics. However, before coming to the heart of the matter, it is essential to put DARES in context.

Social statistics gain recognition

Within the French Ministry of Employment and Solidarity, DARES is primarily responsible for issues related to labour, employment, unemployment and vocational training. The statistical services dealing with these areas have existed within the Ministry for years, but they have only recently been made into a Directorate in their own right.

"DARES was set up in 1992. At that time, I was acting head of the statistical service. The idea behind the project was to provide data for the economic evaluation of employment policies, particularly for the purpose of negotiations with the Finance Ministry, by comparing this information with the budgetary requirements.

"The decision to make us a Directorate was a very important step, because it places the director on the same level as all the other directors, under the direct authority of the Minister."

So what happens to freedom of action and speech in statistical affairs, now that we answer directly to the Minister? Mrs Fouquet asks me rhetorically, providing question and answer in the same breath.

"It's a matter of finding the right balance. The majority of the Directorate's managerial staff and statisticians come from INSEE, the National Economic Studies and Statistical Institute, which gives them considerable moral force.

"In France, there is a strong tradition of independence in statistics, and because of that, statistics are credible. If a Minister attempted to manipulate the data to portray anything other than what the figures or statistical analyses show, it is the Minister who would risk being discredited. Furthermore, the publication timetable, which is set in advance, protects us from any potential pressure to delay or suppress the publication of data for reasons of political expediency."

DARES' structure?

"DARES is composed of three sub-directorates, assisted by three horizontal units. One directorate deals with employment and the labour market, another with salaries, labour and professional relations, while the third is responsible for monitoring and evaluating employment policies and vocational training.

"The first directorate monitors current employment and unemployment trends in particular and carries out studies on specific issues such as early retirement, the position of disabled workers and so on. The second produces statistics and studies on salaries, working conditions and working hours, while the third deals with the statistical follow-up and evaluation of employment and training policies.

"The three horizontal units are responsible for promoting issues that cut across the directorates' spheres of competence. One is in charge of the Ministry's statistical network at regional and departmental level; another carries out macro-economic analyses and the third provides a broader dimension to the studies financed by the directorates and launches calls for proposals on social issues of the future, such as the development of services, working hours, lifestyles etc. DARES does, of course, have a tradition of funding studies, going back over a hundred years to when the Labour Office was set up in 1892, before a Ministry of Employment even existed."

And what part does Europe play in this picture?

"We are also active at European level. We helped to draft the initial questionnaire for the working conditions survey, organised by the Dublin Foundation and are responsible for its implementation in France.

"Under the Euro-Mediterranean partnership agreements, inaugurated in 1995 in Barcelona, we are helping to set up a Euro-Mediterranean observatory for employment and training, which ties in with bilateral co-operation arrangements previously established with Algeria, Morocco and Tunisia. We have established cooperation with the Territory under Palestinian Authority to compile statistics on the employment market. There are also other agreements with Romania, Hungary, Poland, the Czech Republic and Slovakia."

This served to fill in the background. Mrs Fouquet then turned with the same enthusiasm and detail to the social statistics which are needed for the new European priorities, particularly in the context of the 'Employment and Social Policy' Council – the first of its

Born in 1946, Annie Fouquet has had a career that has been dominated by a desire to combine research and political action. Statistics are to some extent the common denominator between these two fields, although Mrs Fouquet was trained as an economist.

Building bridges does seem to be somewhat of a leitmotif in a career that has taken Mrs Fouquet to the 'Social Studies' Division of INSEE, and the statistical services of various Ministries. In 1986, she presented to Mr Chevènement, the left-wing Minister for Education at the time, a plan to create a Directorate to evaluate and forecast trends, which was later implemented by his right-wing successor, Mr Monory. At that time she was technical adviser in the Minister's private office, a post she left the same year to become head of the 'Social Studies' Division at INSEE.

In 1990, she became Deputy Head of Department, then acting Head of the Studies and Statistics Department within the Ministry of Labour, Employment and Vocational Training, which in 1992 became DARES. Annie Fouquet was promoted to Director in April 2000, after over seven years at the head of the Studies and Employment Centre, a public body for studies and analysis reporting to the Ministry of Research and the Ministry of Employment and Solidarity.

At DARES, Annie Fouquet fully intends to pursue the twin objectives of research promotion and policy evaluation, "which is what I have always endeavoured to do", she affirms. After all, for someone who, successively, studied English in the United States then Russian in Paris at the height of the Cold War, what could be more natural than building bridges?

kind – which was held in Lisbon in March.

A dual role

"At European level, employment policy is based on four pillars, namely employability, flexibility, entrepreneurship and equal opportunities, which are in turn underpinned by guidelines and indicators. What is of particular interest in these issues, to which the Lisbon Summit added social integration, is the method used. In fact, the European Union, strictly speaking, has no legal powers in these areas, but it is the Member States which have decreed that they are issues of common concern.

"The Council's Employment Committee is responsible for defining the basic indicators for assessing how far the objectives contained in the guidelines have been met. The indicators play a dual role here. The first is to measure to what extent each country is implementing these guidelines nationally, as each Member State is judged on what it has achieved by comparison with what it has defined as relevant indicators. At the same time, since these indicators were established collectively on a common basis, they serve to chart the relative performance of the Member States.

"The difficulty in the social field is that the statistical measure selected is highly dependent on the social context in which it is used. Take, for example, the unemployment rate – a long-standing definition, which was established by the International Labour Office, and one with which everyone agrees. Even so, when people use the word unemployment, they are not always talking about exactly the same thing.

"In France, for instance, people who have worked up to 78 hours in the month preceding the survey are counted among those looking for work. In some other countries, only those who really need to work for their livelihood or only those who are available to start work immediately are counted as unemployed. The debate about indicators is not just a 'nuts-and-bolts' discussion, it is also a debate about the different types of society. For this reason, discussing indicators at a European level is important, because it allows us to progress towards building something in common."

Counterbalancing structural indicators

"The definition of unemployment is, in a certain sense, a statistical device, a social artefact. Even a highly standardised indicator such as unemployment remains dependent on the form of society and the different ways of tackling unemployment in individual countries. Hence, as part of the Luxembourg process, indicators for monitoring policies make sense as long as they remain within the country concerned. The peer review system, involving representatives from all Member States and of the European Commission, is therefore vital to complement and counterbalance the somewhat 'rough-and-ready' indicator method."

Rough-and-ready?

"Yes – take tax and social security contributions, for example. When people say that they are too high in one country by comparison with another, they do not say in relation to what; nothing is said about the services provided, what they cover and still less how good they are. It is, of course, quite normal that in a country with a State retirement pension system contributions are higher than in a country where the system is private."

35-hour week under scrutiny

"This is why the peer review system of a Member State's individual policy is so important, for it enables the actual content of experiences to be pooled, and any ensuing lessons to be learnt collectively.

"For example, in April 2000, the French policy of reorganising and reducing working hours, 'the 35-hour week', was subjected to searching examination by several other Member States. Viewed from a distance, this policy seems absurd: an example of the French 'nanny State' decreeing the length of the working week, the consequences of which are bound to be catastrophic because this will increase the cost of labour, make businesses less competitive and therefore destroy jobs. "In fact, though, when you look at it close up you realise

DARES' dual challenge

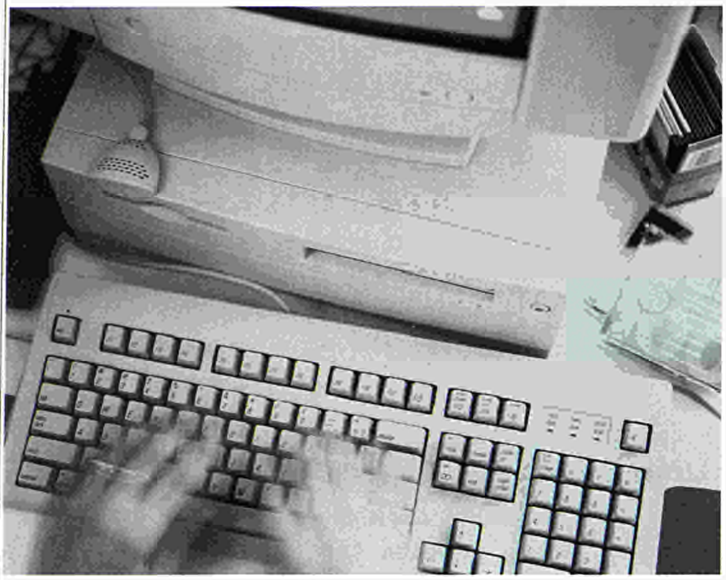
"Bringing policies to the local level, i.e. putting national policies into practice on the ground and decentralising certain areas such as vocational training and the use of new technologies – these are the challenges which the government policies of tomorrow must address.

"This means that the relevant information must be available at local level and must be reliable like real statistics, which involve more than just adding up figures, because there are always gaps, non-responses and so on. So the data have to be re-weighted and checked at every level. This is possible, but it entails far-reaching changes to the ways in which we are used to working. We need to strengthen our network at regional level.

"New technologies will help us achieve this. They will enable the statistics managers in the 22 regional Directorates for labour and employment to input data and produce their own statistics very rapidly, particularly in all areas of employment policy, and also to achieve a very fast turnaround of data. The danger is that people may be misled into believing that counting is the same thing as statistics. To prevent this, data processing is being reorganised so that, locally, people can access the data they need. New technologies are able to provide the necessary support for bringing policies to the local level.

"For the coming three years, and perhaps beyond, the major project is to set up a statistical database on employment policies which can act as an interface between producers and users of statistics. Even then the procedures still have to be established. It will not be easy, … but it is possible."

The Internet, a data collection tool?



In the context of European discussions on producing a short-term labour cost indicator, the use of the Internet to collect data is sometimes presented as a way of coping with the additional workload placed on businesses.

This said, the idea of an Internet questionnaire has received a lukewarm reception in France. Firstly, because there is too much mobility at company level, following the restructurings and mergers that are common nowadays, and also, because there is an equally high degree of mobility of personnel in charge of Internet-related matters working in these companies.

Finally, access to the Internet is still under-developed, as only approximately 20% of DARES' correspondents are connected. At present, DARES uses the Internet, especially as a tool for disseminating information, but hopes to be able to use it increasingly for data collection in the near future.

that, in the French context, this policy has succeeded in pushing through some necessary changes. By putting on the table together the issues of how work is organised and how working hours are arranged – taboo subjects for employers and unions respectively – it has been possible to move the debate about collective bargaining forward. The peers were able to examine, among other matters, this policy's impact on the productivity of the firms involved in implementing it and on employment.

"In 1999, out of the 400,000 new jobs created in France, one third can be attributed to the application of this policy. Thanks to the peer review, the other Member States have been made aware of this fact."

The leverage of open coordination

"This method acts as a powerful lever. The fact that everyone is watching everyone else gives each country an incentive to meet its objectives as effectively as possible. It also provides 'ammunition' in the budget negotiations with the Ministry of Finance. As the European Union is watching what we do, we have to be given the funds to do it properly. An example of this is the 'fresh-start' policy, organised by the National Employment Agency *(ANPE)*, aimed at helping young people to find jobs and adults who have been unemployed for 12 months to get back into the workforce. We have been able to request the necessary resources in terms of both staff and funding to implement this policy.

"As this method works for employment, in Lisbon the decision was taken to apply it to other issues on the social agenda. A high-level working group on social protection has already been set up. This group will probably become a Committee on Social Protection, and will operate in much the same way as the Committee on Employment but in the area of social policy indicators, which are even more difficult to define.

"It is clear, therefore, that statistics do act as a lever, even though the things they measure are not totally comparable, because the figures measure aspects which are related to the social organisation of each individual Member State. Employment is already difficult enough, and the system is far from perfect; but for social protection, things are even more complicated. Then again,... that's very good news for statistics."

What do you see as the main areas of development of social affairs statistics in the future?

"The areas associated with demographic changes, the ageing population, immigration, the way businesses manage the different age groups and lifelong vocational training – these are the ones which primarily come to mind.

"Take vocational training, for instance. Firms in France are required to spend 1.2% of their total wages bill on this item, or to pay an equivalent amount to collection agencies, managed by the social partners. As vocational training falls within the remit of the Regional Councils, these have, to varying degrees, set up training programmes. The Rhône-Alpes region has established a long-term programme on this basis, involving negotiations with the professional organisations.

"Other regions, however, are lagging behind and it is sometimes the Regional Directorate for labour and employment which provides some impetus for these programmes. Basically, the situation in this sector is confused and complicated, and we need to improve our information system to gain a better overview of vocational training.

"This, briefly, is how I see the future development of social statistics on employment." ■

Labour market policy, employment and social protection are not simply issues in which European politics has taken a greater interest since Lisbon – they are also the traditional stamping grounds of the trade unions. As the research centre of the European Trade Union Confederation, the European Trade Union Institute is an active user of European statistical data. *Sigma*'s BARBARA JAKOB met ETUI's Director, **REINER HOFFMANN**.

Forget solemn declarations - what we need is practical policy!

"With the advance of European integration and globalisation, social players no longer have sufficient room for manoeuvre at national level; they must be allowed to act in a European context", says Reiner Hoffmann. It was, he believes, only logical and proper that the issues of employment and social cohesion in Europe were highlighted at the Lisbon special summit of March 2000.

Hoffmann also welcomes the idea of starting a benchmarking process in the area of social affairs. However, he warns against declarations of principle which are not backed up by practical policy.

The ETUI has taken up this challenge and drawn up a set of social convergence criteria. Eight areas have been identified: employment, income distribution, working time, social security, health and safety at the workplace, education and training, social infrastructure and regional cohesion.

"In principle, we welcome the idea of positive competition in the social area, as well as in the areas of budgetary consolidation and the level of inflation – an approach which allows Europe to orientate itself towards the best service providers is interesting and worthy of investigation", says Hoffmann.

Director of the European Trade Union Institute for the past six years, **Reiner Hoffmann** (45) also worked at the interface between the trade union movement and the academic world in his previous post: until October 1994 he led the 'Promotion of Research' department of the Hans-Böckler Foundation, a German institution with trade union links. Originally a sales representative at Höchst, Hoffmann changed careers and studied economics and commerce before turning to work with the trade unions.

No obsession with data

However, thoroughness is required; an obsession with data for their own sake and hasty definition of quantitative criteria are no substitute for in-depth investigation of the facts.

"For example, education expenditure as a share of the gross domestic product is not, on its own, a reliable indicator of the success or efficiency of the education system", continues Hoffmann. More important factors in education, which is such an important area for the social development outlook of a united Europe, are its composition, and whether it is provided privately or state-funded, as well as several other criteria, some of which are qualitative.

"When we talk about social cohesion and social benchmarking, we must not content ourselves with drawing up headings and expecting Eurostat to provide the content", explains Hoffmann. "Most phenomena have been described in detail and with qualifications in Commission documents. This work must be utilised and adapted to provide Eurostat with precise information on policy needs. Of course, the Member States must be prepared to supply these data.

And those governments which solemnly signed the declarations made at the summit must be reminded of their duty to ensure that the appropriate data are collected and prepared."

Another condition of successful social benchmarking is, according to Hoffmann, reliable statistical data. "Otherwise, benchmarking will become a political gimmick that provides little practical help."

Hoffmann's greatest wish is for up-to-date social statistics offering greater comparability. "In other statistical areas, data are kept meticulously up-to-date, because they are important for the functioning of economic and monetary union. If we are now to progress towards social union, what we need are solid, reliable, and, most importantly, up-to-date statistics in the social area."

One factor amongst many

Following monetary union, there has been increasing pressure to provide detailed data on labour and social costs. Here, the information and data on nominal wage settlements in EU countries, as systematically collected by the ETUI, are not enough. On the insistence of the European Central Bank (ECB), Eurostat created a European labour cost index in a relatively short time, but Hoffmann believes that it is insufficient.

The disadvantages of the labour cost index are that it is not sufficiently up-to-date and comparable. "Every month we are faced with the ECB's forecasts on inflation", explains Hoffmann, "but we have nothing we can use for an in-depth analysis of the often-repeated claim that the trade unions' bargaining policy increases the risk of inflation."

Hoffmann therefore advocates the introduction of a European labour price index to provide systematic, comparable and up-to-date data, and function as a reliable statistical tool for actually analysing the alleged inflation risk of wage policy as one price trend factor amongst many.

He is even concerned that we may see the advent of 'regime competition', in which euro-zone countries use low wages and social standards to compete with each other. "Without flexible exchange rate mechanisms, there is a danger that euro-zone countries will use labour and social costs as an instrument of competitiveness" – for Hoffmann, a further reason for demanding reliable data on labour costs and making a case for European coordination of bargaining policy.

Hoffmann would also like to see more meaningful statistics on the issue of structural changes on the labour markets. "I am not so much concerned with improving the third figure after the decimal point in the unemployment rate, as with finding out how labour markets are changing. The important questions here are: Why does the percentage of self-employed workers, at a European average of 4-5%, remain relatively stable? In which areas are new forms of employment and employment relations being created? What differentiations are being made in working time?"

According to Hoffmann, the ETUI's objective is not to defend itself against new forms of employment, but to accompany the structural changes in the labour markets and ensure that the new forms of employment are socially secure. One way of doing this is to analyse the conditions under which atypical employment is at risk of turning into precarious employment.

The European Trade Union Institute (ETUI) was founded in 1978 on the initiative of the European Trade Union Confederation (ETUC). Its role is to form a bridge between the trade union movement and the academic world, keep trade union organisations informed about European matters affecting trade union policy and its implementation, provide scientific expertise and advise the ETUC. In this context, the ETUI also conducts research in the following areas:

- Europeanisation of industrial relations, and
- Employment, labour market and social policy.

The ETUI therefore relies heavily on statistics on social affairs and makes extensive use of Eurostat data.

A European poverty report

An issue closely linked to employment and social security is that of the fight against poverty, and Hoffmann sees this, together with combating unemployment, as one of social policy's most important tasks. "If the fight against poverty is the declared political goal of the Lisbon summit, then we need a European poverty report".

Such a report should not only cover monetary matters, in other words poverty in terms of income, says Hoffmann, but also apply qualitative criteria, such as access to housing and education. That would close the circle of education, employment and poverty.

"Today's industrial and service society has made a clear break away from Taylorist or Fordist mass production towards knowledge-based production and service provision. This trend is reliant on a well-educated workforce.

"We cannot simply explain away the American employment miracle by talking of 'Mcjobs', and, anyway, working-poor trends have been apparent in Europe for some time. The US increase in employment, viewed in Europe with a mixture of scepticism and admiration, is also underpinned by a whole series of quality jobs with established qualification profiles."

A vision worth implementing – and one, incidentally that Reiner Hoffmann shares with the Lisbon signatories. ■

CARLOS CORRÊA GAGO, President of the Portuguese National Statistical Office and host of the 2000 DGINS Conference, shares in the following article his thoughts on the theme 'Information and Knowledge' which was discussed during the conference in Porto last June. He underlines that his ideas are not the Conference's conclusions, but rather a personal reflection.

Bridging the gap between information and knowledge

"Information and knowledge" is of major topical interest in our information society.

Our aim was to place our specific theme of interest, statistical information and knowledge, into a context. Therefore, in the presentations given by other statisticians and representatives of other institutions we focussed on areas where converting the vastly growing amount of accessible information into better knowledge also poses problems – ranging from the exercise of conscious citizenship to what was termed 'progress in civilisation'. The papers presented can all be condensed to formulate the question: "Much more information is available to us, but do we really know much more? ".

Since the conference did not, and was not intended to, lead to a formal summary and since time did not allow detailed discussion, it seems pertinent to continue the debate and give a subjective summary of the areas where there was a notable consensus of opinion.

Carlos Corrêa Gago

Unprecedented progress

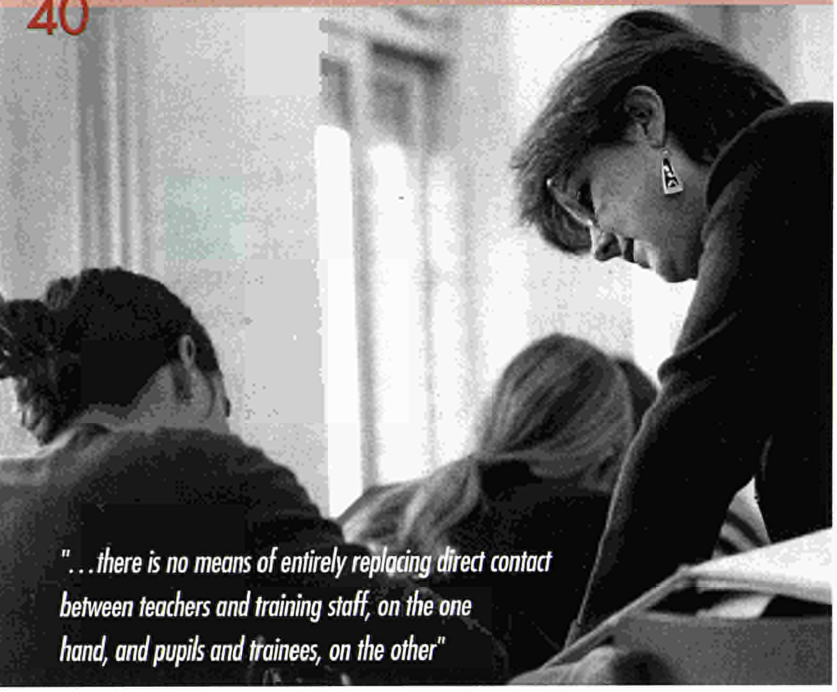
It is practically impossible to measure the stock of knowledge accumulated by humanity in the course of its history – as well as that knowledge not yet known which increases in parallel with that stock. But it is possible to recognise the periods in which knowledge has gone through qualitative and quantitative leaps: classical antiquity, the Renaissance, the modern and contemporary era. We live in one of these periods, benefiting from unprecedented progress in science, technology and communications.

The extension and deepening of knowledge has effects on all citizens in terms of the progress in civilisation of human societies; these effects have multiplied thanks to almost instant access to important elements of this expanding knowledge. So far, these effects have been much less than proportional to the expansion of the knowledge in itself. These modest repercussions vary enormously depending on the areas of knowledge and their respective effects on the behaviour of people and their social activity.

This means that the impressive rate of acceleration of information available by electronic means, especially via the Internet, is only marginally reflected by the rise in the general level of knowledge – processed and correctly assimilated information – of people and societies. The democratisation of access to information is not being accompanied by the democratisation of knowledge.

Among the areas in which positive repercussions of the democratisation of access to information are more visible are:

- The exercise of political power – those governing and those governed, the electors and the elected, in democratic systems, have or are in a position to have, practically the same knowledge, and this deprives politicians of the comparative advantage of possessing information and the argument of authority. This



"...there is no means of entirely replacing direct contact between teachers and training staff, on the one hand, and pupils and trainees, on the other"

then changes their behaviour in a game of persuasion with the same information.

- The exercise of conscious citizenship – persons, individually or organised, have new conditions on which to base or direct their civic activities and participation.

- The exercise of their pedagogical and opinion-forming functions via the 'reference' means of social communication – forming a qualified interface between information, for example statistical data, and the knowledge which can be assimilated by those who consult it regularly.

On the other hand, scientific and technological research, cultural activities and statistical knowledge, themselves, are areas where information has a relatively low general impact on knowledge beyond the professional circles which deal with it. Here, the simple dissemination of invalidated information, frequently incorrect or biased and always fragmentary, largely outweighs the analytical and interpretive treatment necessary for information to be converted into assimilated and enriching knowledge.

The instrumental value of easy electronic access to certain stocks of information is recognised. The same goes for the current possibilities of instant long-distance communications in the current and potential activities of our education and vocational training systems throughout our lives. Yet, so far, there is no means of entirely replacing direct contact between teachers and training staff, on the one hand, and pupils and trainees, on the other.

In the field of official statistical information, which benefits from the skills of producers and main users, political decision-makers, economic agents and social partners recognise the major progress already achieved in the accessibility of this information.

But there are still areas that are ignored, to varying degrees, such as poverty and exclusion, distribution and redistribution of income, holding of assets and accumulation of fortunes, and ecology as the indispensable means of maintaining life on earth in the long term.

Knowledge as a privilege

It can be seen, then, that access to information, thanks to the Internet, is rapidly becoming universalised. However, access to knowledge remains the privilege of a few.

Why? Can this situation be improved by better use of the enormous quantities of information generally accessible for making progress in those aspects of civilisation where no improvement has been recorded? Some reasons were given and a few solutions were identified.

- 'Distribution' of information, mainly in the hands of market mechanisms, is governed by the aims of immediate profitability, which ignore concerns for progress in quality.

- Indicators measuring the development of the communication and information society are also, above all, quantitative: access traffic, number of access terminals and mobile phones sold, number of 'hits' registered, number of consultations, transactions by electronic media, etc.

- What users are told as standard behaviour is the mere acquisition of the access facility. What is being accessed, why and the quality of that information are entirely secondary questions.

- Nation states have generally abandoned any duty to regulate the quality of the content, and especially any direct, supplementary intervention to ensure professional mediation in sensitive areas: scientific and cultural propagation and statistical dissemination are examples.

- This national abdication of responsibility makes it even more difficult to take any action or measures at international level which could clearly cope with 'globalisation', of which the Internet is the main propagator.

- Thus the road has opened up for access to information and information itself not just becoming 'democratised', but also trivialised. This does not provide any stimulation to selective intellectual curiosity and requirements inherent in the process of acquiring knowledge.

Thus what in my view has gained increasing emphasis has been the absence or lack of mechanisms for professional and regulatory mediation for dealing with, validating and increasing the value of this diverse mass of information.

Progress in this direction, in the field of statistical information – which necessarily, for pedagogical purposes includes metadata – will certainly require more active intervention and availability of organs producing official statistics, including Eurostat. ■

MANUELA SILVA, Professor at the Technical University of Lisbon, wants the principle of the individual to be strengthened in the modern market- and state-dominated society. In the following article she expresses her expectations of statistics.

Decoding SOCIETY

"The real wealth of a nation is its people. And the purpose of development is to create an enabling environment for people to enjoy long, healthy and creative lives. This simple but powerful truth is too often forgotten in the pursuit of material and financial wealth"

This article is based on a presentation to the 86th DGINS conference on 'Information and Knowledge' held in Porto from 1-2 June 2000. MANUELA SILVA is economist and emeritus professor at the Technical University of Lisbon.

With these words Mahbub ul Haq opened the first report on human development published by the UNDP (United Nations Development Programme) in 1990. Quoted ten years later in the introduction to the 1999 report they lost none of their relevance and are a perfect start when it comes to discuss the role of statistics and the guidelines for their construction.

It is people, and human welfare and development that need to be at the forefront of the concerns underlying the configuration of statistical systems and the means of facing the various challenges of modern times.

It is a well-known fact that a given situation only acquires substance and becomes visible if it gives rise to information, and especially if the information produced about it is quantified and validated.

Success and failure

The publication of reports on human development is a good example of how statistics play a primordial role in determining the image which the community has of the situation, and as a result, how with the right information it charts out solutions for making the necessary changes.

Over the last decade, the UNDP has made a decisive contribution to the depiction of the socio-economic situation focusing on persons and their welfare as well as contributing to the appraisal of the performances of governments and the market on the basis of their effect on human development, as defined with a set of pertinent indicators. I would regard this as a success in the history of the configuration of statistics.

An example of a failure I would like to mention is a project I participated in: work carried out in the early 1970s under the OECD on setting up a common system of social indicators for all the countries of that organisation. The aim was to cover a range of areas of social concern with the accent on aspects of citizenship. The work almost ended in total failure. 'Almost' because even though the new system was not fully implemented, there still remained a mass of knowledge which is still pertinent in certain academic circles.

We can easily foresee a situation where, if the projected social indicators had been successful in terms of their practical implementation in the national and European statistical systems, we would now have means of recognising, preparing and appraising policies which are more interesting from the point of view of citizenship than the current ones.

It is in democratic societies that it becomes more and more indispensable for citizens to have information available which will allow them to become acquainted with the different facets of collective, public and private life and their trends with objectivity and precision, in order to be able to formulate their opinions and make their choices regarding how policies are conducted and the setting-up of another type of intervention in the life of society.

Lifting the veil which systematically conceals certain aspects of the real situation is one of the needs of citizens. Concealment can also be noticed in statistics.

"...the situation of large fortunes is kept in the dark (as are cases of great poverty..)"

'Terra incognita' of statistics

The distribution of wealth and income, for example, continues to be an area which is inadequately known. In particular, the situation of large fortunes is kept in the dark (as are cases of great poverty, unfortunately, at the other extreme!). A journalist once said that "wealth is the *terra incognita* of statistics".

Data on wealth and its profile are scarce and not very reliable – so little is known with a minimum acceptable level of approximation on the breakdown of the ownership of financial assets quoted on stock exchanges and held by private persons.

On the other hand, poverty and social exclusion were for a long time unknown elements and regarded as inexistent in the societies of organised capitalism. For some time, the dominant ideology even managed to keep the issue tightly concealed. The situation today is varied, but even so, the statistical systems are badly equipped to give a proper account of this genuine social scourge.

Within the sphere of the European Union, it was thanks to the action of the exclusion observatories that concepts, indicators and appropriate methodologies for diagnosing and monitoring policies for combating exclusion were created.

Nonetheless, the observations of Alain Bihr and Roland Pfefferkorn in an article published in *'Le monde diplomatique'*, (Portuguese edition), of May 1999 still appear to be generally true: "Statistical surveys never manage to cover the population situated at the two extremes of the social hierarchy. The poorest, because they do not form part of the traditional family units, being without a fixed abode, living in hostels, pensioners' homes, asylums, prisons, etc. But the richest, too, who receive little attention from inquirers and statisticians, thus attain pleasant anonymity and prosper in its shadow..."

Unisex statistics

Another of the areas which are insufficiently covered by statistical information is gender-based inequality.

Statistics are still based on a notional unisex gender which does not exist and at the current stage of cultural development is identified by the masculine as the rule or standardised norm. Even in cases where statistics allow differentiation by sex the male bias cannot always be avoided since data are based on concepts which refer primarily to the masculine situation and only secondarily to the feminine dimension. One striking example is what is referred to as statistics on the distribution of time and generally to information, if available, on the domestic sphere.

We could continue to provide other examples of fields where there is a need to invest in orienting statistics more towards the citizen and ecology in this information age.

Enormous challenge

Today, despite the greater volume of information available, there is more social obscurity since in the past three decades the situation has become much more complex and fragmented. As Fitoussi and Rosanvallon say: "Society now proves to be less legible and more difficult to decode" ("A nova era das desigualidades" – The new age of inequality), Celta, 1997). And later they ask themselves: "How can such a paradox be explained?"

The answer is simple: the tools of statistical knowledge – the classifications they produce, the categories they use, the concepts under which they are organised – were thought up in the 1950s to cover a society of different classes which was totally comprehensive and hierarchically organised, and relatively slow in changing. They therefore allow little more than a limited coverage of today's society.

The diagnosis made by these French researchers of repute seems pertinent to me. But if it is so, and I think it is, the persons currently responsible for statistical systems face the challenge of an enormous amount of work which cannot be put off. What is at risk is the future of democratic societies in the close relationship which is taking shape between citizenship, information and social awareness. ■

The Spanish government decided last July to replace **Pilar Martín-Guzmán** as president of the Instituto Nacional de Estatistica (INE).
The same day, the government appointed another woman at the helm of Spanish statistics, Ms **Carmen Alcaide Guindo.**

A new president heads the Spanish INE

Carmen Alcaide Guindo comes from the world of statistics and economic analysis. Immediately before being appointed president of the INE, she was director of the studies service of the Instituto de Credito Oficial (ICO). She graduated in Economics and Business Administration from the Complutense University of Madrid and holds a Master's Degree in General Management from the University of Navarra.

Carmen Alcaide actually started her career at the national statistical institute, spending one year in the price index department before joining the studies service of the Banco de Bilbao in 1969. She steadily climbed the hierarchy and, in 1993, became director of short-term analysis and macroeconomics at the studies service of the Banco Bilbao Vizcaya (BBV) and director of market analysis at the BBV in 1997. In 1998, she moved to the Instituto de Credito Oficial.

Carmen Alcaide is also familiar with the academic world having lectured in 'Statistics as applied to Social Sciences' in the Faculty of Political Science and Sociology at the Complutense University Madrid between 1974 and 1983 and in 'Spanish economy' at the Carlos III University, Madrid, from 1991 until 1996.

By taking over as president of the INE, she has come full circle, back to the place where she started her professional career. She is known for her pragmatic professional approach to the use of statistics. Her aim is to stimulate the improvement of statistics and their availability for users.

Pilar Martín-Guzmán (aged 57) headed the Spanish statistical office since July 1996 when, last July, the Spanish Government decided to appoint Carmen Alcaide Guindo (aged 55) as her successor.

When Martín-Guzmán was called by the Spanish government to chair the INE, she was pursuing a highly successful academic career. In the 'European statistical community' she is appreciated as being professional and independent-minded – characteristics that were decisive in her appointment by the government, she told *Sigma* in an interview at the beginning of her term of office (*Sigma 1/97*). "I wouldn't have put at stake my personal reputation of being independent", she said in the same interview and refused then to speculate about how long she might stay. She has now returned to her post as Professor of Statistics at the University of Madrid.

Promoting official statistics in academia and especially among the younger generation academics is the aim of an award being granted once a year by the German Federal Statistical Office.

An AWARD to promote official statistics

The Federal Statistical Office decided last year to grant the Gerhard Fürst Award for outstanding doctoral theses and diplomas or master's dissertations discussing basic theoretical aspects closely related to the functions of official statistics or studying empirical issues using official statistical data. The topics may range from theoretical statistics to economics or social sciences through economic or social statistics.

The aim of the Gerhard Fürst Award is to promote aspects of official statistics in university training and strengthen cooperation between the academic community and official statistics' bodies.

In naming the award after its first President, the Federal Statistical Office intends to honour the man who shaped the organisational and legal structure of the system of official statistics in Germany after 1945. He also held the function of Chairman of the German Statistical Society for many years, therefore contributing to the excellent reputation that German statistics gained both nationally and internationally.

The endowment granted for a doctoral thesis amounts to 5,000 Euro and for a diploma/master's dissertation 2,500 Euro. It also includes the possibility of publishing the winning paper – if suitable in excerpt form – in the scientific forum of German official statistics, the *'Spectrum of Federal Statistics'* and the publication of an article outlining the author's work in the Office's monthly publication *'Economy and Statistics'*.

The endowments can be shared exceptionally among the authors of several worthy papers. The jury may award a promotion prize for very good papers, which do not quite meet the award's high demands. It may also decide not to grant an award if none of the papers submitted are deemed worthy of receiving it.

The awards will be granted to winners once a year in November during a Scientific Colloquium organised by the Federal Statistical Office together with the German Statistical Society in Wiesbaden.

High-level jury

The high scientific demands made by the Federal Statistical Office for providing the award are reflected in the composition of the jury which comprises top-level experts:

Prof. Dr. Hans Wolfgang Brachinger, Seminar for Statistics, University Freiburg/Switzerland;

Prof. Dr. Richard Hauser, Institute for Economics, Johann Wolfgang Goethe-Universität, Frankfurt am Main,

Prof. Dr. Ullrich Heilemann, Rhine-Westphalia Institute for Economic Research, Essen;

Prof. Dr. Johannes Huinink, Institute for Sociology, University of Rostock;

Prof. Dr. Walter Müller, Chair of Empirical Social Research Methods and Applied Sociology, Universität Mannheim;

Prof. Dr. Werner Neubauer, Institute for Statistics and Mathematics, Johann Wolfgang Goethe-Universität, Frankfurt am Main;

Proposals for papers (in German or English) for selection for the award can be submitted by tutoring professors until 31 March of each year. The papers must have been given a final assessment in the two preceding years, gaining at least a 'good' or 'magna cum laude' grade. They should not have been submitted for, nor received, any other awards.

This year it was decided to share the Gerhard-Furst Prize in the category of 'Dissertations'. The members of the Jury awarded the prize to both Werner Bonte for "The influence of industrial research and development on developing productivity in German industry" (University of Hamburg) and Klaus Eberl for "Theory and empirical evidence of the demand for money: a seasonal cointegration analysis of liquidity-oriented money supply" (Catholic University of Eichstatt). In addition, Leontine von Kulmiz was awarded a promotion prize for her dissertation on "The poor remuneration of women at work: salary differentiation or discrimination?" (University Johannes Gutenberg).

In the category 'Diploma and master's dissertations', Henning Lohmann (University of Bielefeld) was awarded a prize for "Potential use of expenditure data in empirical research on poverty - estimation of need and measurement of poverty on the basis of the 1993 Income and Consumption Sample Survey."

For more information about the Gerhard Fürst Award, please contact the Federal Statistical Office: telephone: (+49-611) 75-2695, email: institut@statistik-bund.de

A statistical office that in an opinion poll turns out to be regarded as one of the most reliable sources of information, its data being quoted in the news almost every day and its managers frequently asked by TV stations and newspapers for their comment... A statistician's dream? *Sigma*'s BARBARA JAKOB found in Statistics Norway an institution in a very lucky position. She talked to its director-general **SVEIN LONGVA**.

An institution that COUNTS

Statistics Norway is very active in profiling official statistics and striving to play a role in the public debate. This comprises not only the pleasures of public exposure such as the appearance of the Director-General in the evening news but also less publicity effective tasks such as Statistics Norway's presence in a number of government commissions.

"We want to be present and recognised as the source", Longva explains. "If we are not visible enough people might start thinking 'Why should we give money and efforts to an institution that we never hear about?' That we are well-known and accepted by all political parties as a reference source is certainly the result of our efforts to familiarise the public and politicians with statistics and the difficulties of production."

An informed public debate

Statistics Norway (SN) takes its task "to strengthen and further develop democracy and a more informed public debate" very serious and which, in fact, almost caused an upheaval once in the past: "Before the referendum concerning EU membership in 1994 we prepared a report on the economic effects and the differences of membership in the EU and in the EEA", Longva recalls. "It was strongly attacked. But we said to ourselves if we are to serve the public we have to especially do so in the time of crucial decisions and should come up with the information we have instead of keeping it back." The report was later published in an academic journal.

After this incident, SN decided to present regularly before elections statistics that are relevant to the public debate. "We *do* interfere somehow", Longva admits "but we are doing so to serve the debate with facts.

Svein Longva (56) has dedicated his entire professional life to statistics. When he started working at Statistics Norway in 1966, then a student of economics at the University of Oslo, he certainly would not have expected to end up as its Director-General having spent more than 30 years there.

He started his career in the research department constructing economic models and dealing with econometrics and becoming director of research in 1984 and Director-General in 1991. He also did a visiting scholarship at Harvard University and was professor of economics from 1989-1992 at the University of Bergen.

As Director-General – a nomination which came as quite a surprise to him – Longva enjoyed the opportunity "to discover the institution a second time from a completely different angle".

At the international level he is known as President of the Conference of European Statisticians (CES) and as member of the International Statistical Institute (ISI).

And it may happen that indirectly we support one or the other side. But it is our mission to ensure that policy is based on the best possible factual basis."

That leads us directly to the topic 'independence'. According to the statistics act SN is an independent institution under the Ministry of Finance which means that in budgetary and administrative matters it may be instructed by the Minister but not when it comes to the production of statistics. The budgetary provisions are very generally formulated and SN has a rather decentralised management system enabling the Office to decide on its own how to use and possibly redirect means.

In addition to producing most of Norway's official statistics, SN is also among the largest social sciences institutes of the country. As such, it does research in the economic and social field and also provides forecasts. This very special situation for a statistical office – to analyse its own statistics – increases the risk that it is reproached for being partial. "As soon as you get a bit further than simply producing the numbers, you inevitably take part in the public debate", Longva states. SN also develops and maintains the models used by the Ministry of Finance and other ministries. Under a special agreement with the Parliament it also serves the political parties with analyses and model simulations of policy proposals.

But he perceives the fact that research activity is part

A proud past

Statistics Norway will celebrate its 125th anniversary in 2001, being established in 1876 as a formally independent institution. A forerunner, the Tabulation Office within the Ministry of Finance, existed already since 1797 and the first population census was carried out as early as 1769.

SN is very proud of its past: It enjoyed from the very beginning a fairly prominent position and was well accepted by the public. One of its features is the institute's openness to new technological and methodological developments starting with its first director-general who strongly promoted sample surveys and arranged the first to be carried out in 1893. He was also one of the first to buy an electric punch-card machine that he personally brought over from the US.

On the occasion of the millennium change, SN published a booklet on 100 years of Norwegian history and the statistics that went with it.

of SN's activities more as one of its strengths rather than a burden since it helps to reveal deficiencies and improve quality.

Independence as an attitude

When it comes to the question of whether to give the Minister notice of statistics about to be released, Longva is strict: "We have an official release calendar which makes our publication plans transparent to everybody." And the Ministry is not in a favoured position concerning the receipt of the data. "They have to consult our internet site after release, just like anybody else.

"Politicians have recognised that we will not be useful for anybody if there are doubts about our independence", Longva says and adds "Independence is also an attitude. You can be formally independent by law but only in theory whereas in reality you get hints from the government not to release certain figures. And maybe even worse, it might even not be necessary to get a hint, you might already anticipate and act accordingly."

An equal partner

Longva, however, seems not at risk of doing so. Although there are powers that he has to accept. – After several times saying 'no', sometimes with a slim majority but still a majority, Norway is not an EU member. But it has, as member of the European Economic Area (EEA), a number of statistical obligations to fulfil.

"The formal legal requirements are, in principle, the same for us as for the EU Member States and equally legally binding", Longva explains. According to the EEA agreement, the various EU Directives and Regulations have to be adopted by the Norwegian Parliament. Apart from some areas that are directly linked with EU or EMU membership such as Intrastat, agricultural statistics or statistical requirements for Monetary Union nothing has been set aside in statistics. "Norway was in fact the first country to present its national accounts according to the new ESA 95 (European System of National Accounts)", Longva reveals not without pride.

As part of the EEA agreement, SN takes part in all working parties, task forces and meetings of the Statistical Programme Committee, regularly detaches national officials to work at Eurostat and also holds the EFTA secretariat in Luxembourg. "We are treated by Eurostat as an equal partner", Longva says. "We can't vote but we can take part in debates and make our position clear and, in fact, we are asked for our position.

"The main influence is through being an active partner", he states. "Voting is in most cases a formal exercise except in a very few tricky areas."

Open to the world

The importance of the work going on within the Union in the field of statistics has grown over the years and is felt more and more. Around 80% of the work at Eurostat is, according to Longva, of direct relevance for SN or an obligation. Cooperation with the EU obviously plays a dominant role, although SN is also very much involved in the work of the OECD, the IMF and various UN organisations.

Cooperation with the EU is, however, of a different quality. Longva: "Whereas other international work is very much related to the development of standards and recommendations, primarily on a voluntary basis, work within Eurostat is mostly an obligation and directly affects the production activity including obligations for the time scale etc."

But Longva does not perceive EU statistical cooperation as a burden – not in the first place. "We are also gaining a lot", he says. "Through this cooperation we are opening up our institute to the world."

Weak spots

Longva is very demanding in this respect. He wants all Norwegian official statistics to be published in English next to Norwegian and he perceives it as a weakness that this is not the case. "We are not publishing enough in English", he says. "And I am not really satisfied with the English version on the

som et naturlig avløp for overbefolkning. Etter århundreskiftet var

tallet, men de kunne nok lett bli like store som utvandringen selv.

Foto: Knudsens fotosenter

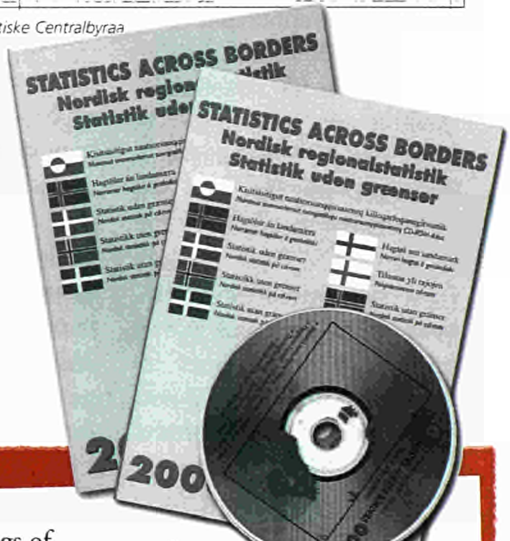
Den oversjøiske utvandring i aarene 1901—1911

		1901-1905.	1906.	1907.	1908.	1909.	1910.	1911.
Kjøn. *Sexe.*								
Mandkjøn. *Sexe masc.*		65 599	13 871	13 872	4 275	10 094	12 291	7 556
Kvindekjøn. *Sexe fém.*		37 596	8 096	8 263	4 222	6 058	6 621	4 921
Ialt. *Total*		103 195	21 967	22 135	8 497	16 152	18 912	12 477
Alder. *Age.*								
0—14 aar. *Ans*	M.	7 153	1 269	1 230	611	684	868	496
	K.	6 668	1 083	1 246	636	698	785	479
15—29 — —	M.	46 513	10 025	10 216	2 940	7 711	9 471	6 022
	K.	23 152	5 123	5 460	2 708	4 205	4 554	3 548
30—59 — —	M.	11 365	2 509	2 348	690	1 654	1 888	981
	K.	7 164	1 782	1 488	810	1 085	1 194	831
60 aar og derover	M.	512	62	78	33	44	61	55
	K.	595	103	69	67	70	82	60
Uopgit alder. *Age inconnu*	M.	56	6	-	1	1	3	2
	K.	17	5	-	1	-	3	3
Bestemmelsessted. *Pays de destination.*								
Kanada. *Canada*		5 411	1 476	[1] 1 490	610	[2] 880	1 513	[3] 1 304
Amerikas Forenede Stater. *États-Unis de l'Amérique*		97 185	20 449	20 615	7 850	15 237	17 361	11 122
Mellem- og Sydamerika. *Reste de l'Amérique*		90	14	16	18	12	13	23
Australien. *Australie*		23	1	3	9	12	8	2
Afrika. *Afrique*		485	26	11	10	9	17	24
Asien. *Asie*		1	1	-	-	2	-	2

Kilde: Statistisk aarbok for kongeriket Norge 1912, utgitt av Det statistiske Centralbyraa

***Emigration statistics** 1901-1911*

The table from the 1912 statistical yearbook of Norway indicates that from 1901-1907, around 20,000 Norwegians left their country each year to make their way in the 'new world'. Interestingly, the second language used in the tables was French.



Long tradition of cooperation

Partly because the countries have a common history, partly because of size, statistical systems and cultural similarities – the fact is that the Nordic countries have a rather long tradition of working together, so long that Longva perceives it as something natural. "One big advantage is that we do not have to start explaining and we can really seek advice. We are very open about our problems and do not just tell each other success stories", he says.

The statistical meetings of Nordic countries date back to 1889. Nowadays the heads of the offices and their directors meet annually with a large meeting every three years. Additionally, there are a number of bilateral meetings to discuss specific subject matters.

Next to many projects carried out together and close cooperation in IT, databases, register use etc. the most visible outcome of the Nordic cooperation is probably the annually published Statistical Yearbook and the CD-ROM '*Statistics across borders*'. Based on data from the Common Nordic Statistical Database and on material supplied by Nordic statistical offices on large city regions it provides data on a wide range of statistical fields for Denmark, the Faroe Islands, Iceland, Norway, Greenland, Finland, Sweden and Aaland.

Internet to be restricted as is currently the case."

Another weakness is felt in statistics for the public sector which according to the Director-General is not very well covered. "This is a very unsatisfactory situation since an important part of the public debate, e.g. on the health and education system, is related to this question."

A large project on the reporting of municipalities to the State aimed to improve the coordination of statistics on services and financial data for public administration is expected to bring major improvements but further efforts will probably need to be made. "Following the IMF data dissemination standard we are poor when it comes to timeliness of statistics for government accounts. We have special problems with the quarterly data for the government sector."

User databases and their ease of access and use is another weak spot for Longva. "We have until now not been at the front of providing a user-friendly database. Most of the people were obviously happy with what we offered on the Internet so that we were able to serve the few others who were asking for more on demand. We have now decided to work closely with Denmark and Sweden who are very much ahead of us in this respect."

Longva does not hesitate to continue his list of areas for possible improvements. He would, for instance, wish to see better statistics on a regional level – an undertaking that in sparsely populated Norway becomes rapidly very costly. "The demand for regional statistics is pressing", says Longva "since regional policy plays an increasingly important role in Norway and is also probably the main reason for the no vote for EU membership in 1994."

Svein Longva in front of paintings of his predecessors: A.N. Kiær (left painting), the first director-general of Statistics Norway stayed for 46 years. Longva's term of office is now restricted by law to a maximum of 15 years. The paintings represent a real value for Statistics Norway – they are from famous Norwegian artists, e.g. Edvard Munch

A systematic quality approach

Being aware of the weaknesses of the statistical system, Longva aims for a systematic quality approach. Although producing high-quality statistics is not something new he feels that a more methodical attitude comprising the analysis and documentation of processes is necessary. Statistics Norway therefore just started this autumn a "more fully-fledged programme" of quality management named 'Systematic Quality Work'.

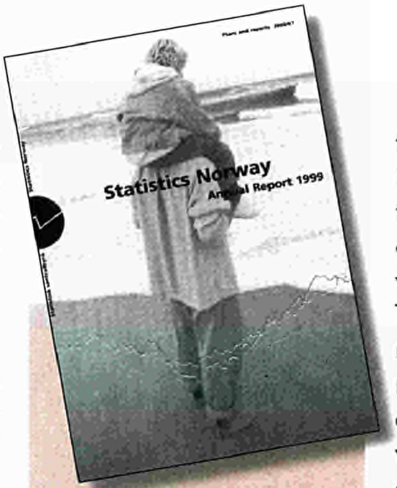
"The expectations in quality are higher than ever before", Longva says as he explains this measure. "The use of statistics has radically changed. Whereas in former times statistics served more or less as general background, they are now often directly related to decisions whether concerning inflation as a target for the ECB's monetary policy, or the GNP as the basis to fix EU countries' contributions for Brussels or population and housing figures as the basis for the allocation of central government funds to the municipalities.

"Consequently, the demand to document and prove the quality of statistical data is much more pressing nowadays. We have started with the quality project not because we think we are behind everybody else", Longva continues. "But we know that we have a great deal of areas where we can improve – maybe even without much cost, simply by thinking in other terms than just the same old rules, by redirecting resources etc."

Dream… or nightmare

Ranking Statistics Norway "behind everybody else", as Longva said, would without question be misplaced. One of its most apparent features – and strengths equally – is its right to use administrative registers.

The statistics act gives SN full access to all public registers for statistical purposes. This cannot be disputed by the owner of these records be it tax, labour authorities



In its **annual report**, the statistical office informs about its main activities, its objectives and performance over the year.

Statistics Norway is an independent institution under the Ministry of Finance. It has around 900 employees at two sites: well over 500 in Oslo and almost 400 in Kongsvinger, in the South-East of Norway. More than 50% of its staff have a university degree. The 1989 statistics act, the second in the institution's history, provides the legal framework for its activities. That SN's directors-general tend to outlive by far (with terms of office between around 10 and 46 years) the governments by which they were appointed can be interpreted as a proof of its professional independence.

or public insurance companies. Currently SN makes use of about 60 registers operated by various government or municipality offices.

But what makes it a real treasure for statisticians is the identification code for individuals, businesses and buildings. What seems like a dream for statisticians might cause nightmares to others. The personal numbering code enables the linking of information related to an individual or business from different registers. It gives statisticians the opportunity to make the best possible use of already available information – something extremely important since complaints about the response burden increase.

On the other hand this is exactly what makes data protectors worry when thinking about a possible misuse. "Data confidentiality is tremendously important", Longva comments. "In fact, it is a question of life and death for such a system to stick to the rules strictly. Once you have lost public confidence it is impossible to operate it."

One-way traffic

But since a register system can only fully be used with a general numbering system and because data protection is such a delicate problem the conditions of register use are rigorously regulated and Statistics Norway is under strict surveillance. "We are the only institution to get access to all the different registers", Longva explains. "We are not allowed to give any individual information to anyone else. The law only allows a one-way traffic of individual data, only to, and never from Statistics Norway."

The Norwegian Data Inspectorate is the separate independent agency watching over the rules and laws to be respected. It gives SN the permission for generating links and fixes the conditions under which SN is allowed to store data and when it has to destroy them. To avoid leaks and unauthorized use, the SN internal network must be strictly separated from external systems which means, e.g., Internet connection only from stand-alone PCs.

Also researchers can profit from the possibilities offered by register use. Once researchers have the permission of the Data Inspectorate they can ask SN to get access to anonymised micro-data for research purposes. "I try to convince the research community that they live in paradise", Longva says, "but they continue to complain about the rules being too strict."

Although SN does not operate the registers itself, it is sometimes involved in establishing the infrastructure and influencing the data collection to better adapt to statistical requirements when it comes to building up a register. "We recently made big progress just by convincing the tax authorities to make a small change in the formulation of a question", Longva states.

The population census to be carried out in 2001 will be completely done by register. And the housing census will for the last time be carried out through questionnaires since SN is working on a project to complete its system for the identification of buildings that currently only allows identification of single family houses.

"That is for the moment the peak of the possibilities offered by registers that we can think of", Longva says. But, in fact, SN is already working on further possibilities of retrieving information in a simple way. Turnover, but also some data for the consumer price index, are on an experimental basis taken from the bar code systems in shops. These systems contain daily accounts of the stocks, prices and other information valuable for statistics.

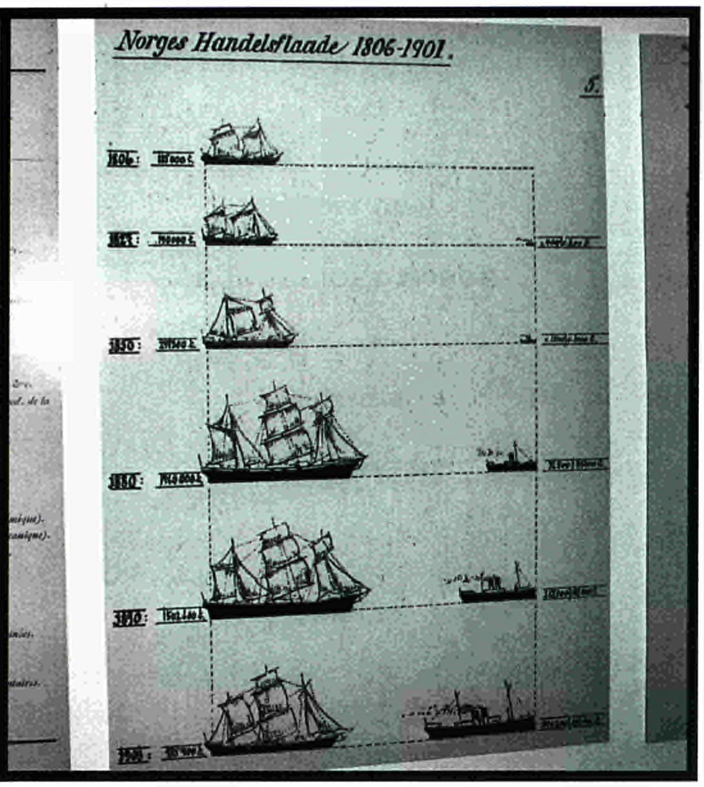
Statistics for the citizen

"We also made big progress in dissemination", Longva reports. Two journalists make sure that statistics are presented in a form likely to interest the general public. "Our core tool for dissemination is the Internet. Everything is published there first." With up to two million hits a month, this quite comprehensive service seems to be appreciated by a population of 4.5 million.

The Internet also helps save money. It opens the opportunity to reduce the share of printed publications to the minimum and also downloading from the Internet is free of charge. SN's pricing policy is to charge the marginal costs for official statistics. Longva: "Our conviction is that we should not limit the use of statistics to a small fraction of the population and tax payers pay anyway for a large part of producing official statistics."

The part regarded as the basic core of statistics and as a public good makes up for around 75% of SN's

A nation of sailors – a light in the form of a lighthouse at the entrance of Statistics Norway



Graphs are not an invention of the computer age. Already at the beginning of this century they were used to illustrate how steamships gained importance in Norway's fleet compared to sailships

budget and is provided by the government. About 25% of the total budget is gained through the sale of publications and the production of tailor-made products that are payable at their average costs.

Simpler and more meaningful

One major challenge for Longva is to reduce the response burden for respondents. Since statistics in Norway is known to be register-based, one might think that Norwegian companies have no reason to complain. Only a very small fraction of companies is concerned by sample surveys. "But those who are asked *do* complain and they have the right to do so", Longva says.

"However, our share of the burden that we impose on businesses is very limited – it is estimated to be around 2%, similar figures are suggested for Australia, the Netherlands, Denmark, Sweden. But official statistics are felt to be the worst", Longva explains.

"It is easier to understand why you have to fill out a tax form. You might complain about the taxes but you fill in the form without complaining. It is much more difficult for the business community to understand why we need statistical information. Many of them do not use statistics themselves and if they do so it is different departments.

"In addition, we are often mixed up with others: questionnaires of associations, research institutes, marketing companies – are all referred to us. We try therefore to do our best and to explain and we give an incentive to reply by offering feedback information in return, e.g. about the market in which the company operates."

SN also established a project for electronic data interchange with the business community aimed at facilitating data exchange. Another attempt is made to relate the statistical information directly to the companies' internal systems so that, e.g., the accounting system produces as a sort of by-product the elements for statistical information.

"We know that the ability of systems to produce the elements for official statistics is very often a basic condition of the buyers of such products. So, we are in dialogue with the software providers dominating the market."

More than counting apples

Another future challenge for Longva is what he calls 'the loosening up of society's structure'. "It's not easy nowadays to distinguish between various economic activities in the information society age, the borderlines are blurred", he explains. "The units are changing quickly, small companies are coming and going, characterisation of the activity and definition are increasingly complex.

"Globalisation makes flows across borders easier. At the same time traditional checkpoints as customs declarations for trade are gradually vanishing, companies have no physical location any more – thus it is getting more and more difficult to keep track of both, the units and the flows. It is easier to count apples than flows on the Internet.

"That has profound influence on statistics. Statisticians in Eastern Europe were confronted with the problem that all traditional checkpoints broke down with Communism. New measurement points had to be reinvented and rebuilt. We are experiencing something similar now but due to economic developments, new technologies and globalisation.

"It becomes more and more difficult to produce a statistical system integrated over time, so we will face more difficult but also more interesting times. Statistics is not only counting and it becomes less and less so – maybe it has never really been." ■

This summer the Commission appointed three new directors at Eurostat: **Daniel Byk, Lothar Jensen** and **Bart Meganck**. In October another change took place with **Marian O'Leary** replacing Alain Chantraine who had been Chief Advisor and head of Eurostat's general administration Directorate R, and who retired after spending 38 years at Eurostat.

Four new directors at EUROSTAT


Daniel Byk


Lothar Jensen


Bart Meganck


Marian O'Leary

Daniel Byk (52, French) studied at the *Ecole nationale de la statistique et de l'administration* (ENSAE). After two years with INSEE, he came to Eurostat in 1974 where he was responsible for the user database Cronos and later for the 'Development' section of the specialist service 'Analyses and Development'. In 1988 he was appointed Head of Unit 'Industry statistics'. In 1994 he moved to the 'Information and Dissemination' unit and became advisor in charge of the directorate covering the units 'Information and Dissemination', 'Transport', 'Technical Cooperation with Non-Member Countries (excl. Phare and Tacis countries)' and 'Foreign Trade Statistics' in 1998. He is now Director of these units.

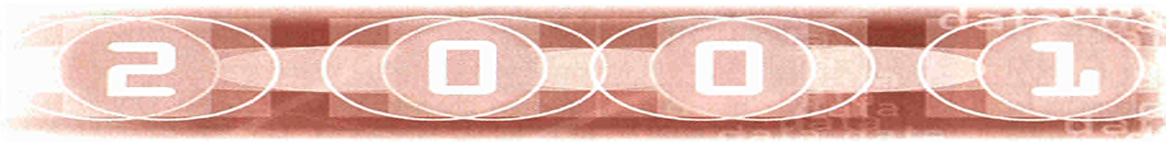
Lothar Jensen (56, German) studied economics and mathematics at the University of Saarland followed by an academic career in economic and statistical science at the Universities of Saarland and Munich between 1969 and 1974. In December 1974 he joined Eurostat, where he dealt successively with external trade (1974-1981), national accounts (1981-1982) and industry (1983-1987). In 1988 he was appointed Assistant to the Director-General, and in 1992 Head of Unit 'Administration and Staff'. Lothar Jensen is now head of Directorate E 'Social and Regional Statistics and Geographical Information System'.

Bart Meganck (55, Belgian) is no stranger to European statistics. As head of Belgium's national accounts, he took part in the work of the Statistical Programme Committee. This is not the only European statistical committee that he was involved with, because he was Chairman of the Committee on Monetary, Financial and Balance of Payment Statistics (CMFB), and, as a central banker, he was a member of the Statistical Committee of the European Central Bank.

Before moving to Eurostat this year, he spent 30 years at the Central Bank of Belgium, where he divided his time between research and statistics. Management of the national accounts – a job which the central bank took over after the reform of Belgian statistics in 1994 – and meeting the European deadlines for Economic and Monetary Union were among the major challenges he had to tackle as Director of the general statistics department and representative of the Belgian national accounts institute.

Since October of this year, he heads Eurostat Directorate B, 'Economic Statistics; economic and monetary convergence'.

Marian O'Leary (47, Irish) holds a Bachelor of Arts degree. After her studies she stepped into a diplomatic career in the Irish Department of Foreign Affairs (Dublin, Paris, Geneva) in 1973 and was a senior lecturer at the European Institute of Public Administration in Maastricht for two years. In 1984 she joined the European Commission's Directorate-General 'Telecommunications, Information Market and Exploitation of Research'. She changed to the Informatics Directorate in 1991 dealing with personnel and internal resources, a unit for which she became responsible in 1997. She held the same post in DG 'Administration' before taking over the management of Eurostat's Directorate 'R' last October. ■



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