Making data useful for various audiences: social reports, data archives and policy papers

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with contributions by

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Outline: the structure of the presentation.
1. Social reporting and social monitoring
(István György Tóth)

The ultimate questions of social monitoring and social reporting:

Starting point: crucial policy problems for policy making. Evidence based policies require a continuous monitoring of and reporting on

- „living conditions“ (the level and variance of objective living conditions and subjective well-being – also compared to other societies?)
- „well-being“ (is life getting better or worse (on average and for specific parts of the population) and
- „societal progress“, (how the quality of the society, governance, social cohesion, sustainability, performance of and trust in institutions is evolving)?
Aims and Audiences of Social Monitoring and Social Reporting

- Inform and enlighten citizens and the general public – in this sense, SM/SR is part of societal involvement and of ‘democratic infrastructure’ and contributes to better society.
- Provide expert knowledge for political elites, administrations and governments / in this sense SM/SR creates and supply knowledge for the continuous self-reflection of societies and with this, contributes to better government.
- Enhance systematic (scientific) knowledge about the functioning of societies / receiving/providing feedback from/to the scientific community on methods, approaches, datasources, etc. and this is a contribution to better social research.
Basic Characteristics of Social Monitoring and Reporting

- Focus on Well-being / Quality of Life of Citizens
- Level / Units of Observation: Individuals and Private Households
- Outcomes Oriented Measurement
- Normative Perspective
- Policy Orientation
- Empirical - Quantitative Approach
- Representativeness
- Importance of Specific Kinds of Data, in Particular Survey Data
- Continuity of Monitoring and Reporting Across Time
- Intelligibility

Source: Noll, 2012
<table>
<thead>
<tr>
<th>Country/</th>
<th>Institution</th>
<th>Title</th>
<th>First Edition</th>
<th>Latest Edition</th>
<th>Period</th>
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<tr>
<td>Denmark</td>
<td>Danmarks Statistics / Socialforskningsintituttet</td>
<td>Levevilkar / Danmark</td>
<td>1976</td>
<td>1999</td>
<td>4-5 years</td>
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<td>Germany</td>
<td>Statistisches Bundesamt /GESIS /WZB</td>
<td>Datenreport</td>
<td>1983</td>
<td>2011</td>
<td>2 years</td>
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<td>UK</td>
<td>Central Statistical Office</td>
<td>Social Trends</td>
<td>1970</td>
<td>2011</td>
<td>1 year</td>
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<td>Hungary</td>
<td>Tárki</td>
<td>Social Report</td>
<td>1992</td>
<td>2010</td>
<td>2 years</td>
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<td>La Situazione del Paese Rapporto situazione sociale del Paese</td>
<td>1992, 1967</td>
<td>2010, 2011</td>
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<td>Luxembourg</td>
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<td>Portrait économique et social du Luxembourg</td>
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<td>2006</td>
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<td>This is Norway Social Trends</td>
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<td>2009, 2000</td>
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<td>Indicadores sociales de Espana Barometro Social de Espana</td>
<td>2003, 1994</td>
<td>2010, 2009</td>
<td>1 year/1 year</td>
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<td>Sidos</td>
<td>Sozialbericht</td>
<td>2000</td>
<td>2008</td>
<td>4 years</td>
</tr>
</tbody>
</table>

Source: Noll, 2012
An example: Social Reporting in Hungary
Social Reporting by Tarki Social Research Institute

The Hungarian Social Report

History

1990-2010 Social report

Sometimes english editions
Main thrust: to provide statistics and interpretations, integrated

It is not only statistics:
value choices and pragmatic considerations also matter

Selection of topics: be relevant and be based on recently collected statistical and survey data

Selection of authors: references and commitment to empirical analysis

The books: indicators and interpretations combined

Financing: Ministry of welfare (or equivalents)

Main audience: students at universities, researchers, policy makers, general audience

Standards: ethical AND scientific
The Hungarian Social Report

Indicators monitored

• Population and family demography
• Training and education
• Employment
• Social structure
• Incomes
• Consumption
• Housing
• Health
• Time use, lifestyle
• Cultural activities
• Deviant behaviour

Cross cutting features:

International outlook
Policy relevance
Other social reporting activity by Tarki Social Research Institute:

Changing Roles (Report on the Situation of Women and Men in Hungary)

Topics covered

- Political representation
- Emloyment
- Management positions
- Maternity support
  - Fertility plans and decisions
  - Intra household distribution of labour
- Health status

- Early retirement
- Poverty in Hungary and in the EU
- Roma women in CEE
- Migration
- Violence in family
- Prostitution, trafficking
Reports on the European social situation

Employment and Social Developments in Europe 2011
1. Social monitoring and social reporting

2. Data archives

3. Policy papers

Outline: the structure of the presentation.
2. Social Science Data Archives
(István György Tóth)
The meaning of data archives

• Long-term preservation of digital research datasets from domestic and international studies;

• Keeping pace with technological change and participation in the development of data archiving standards;

• Providing access to data collections of empirical studies for users communities;

• Facilitating effective data use by providing access to own and to partners' collections.
The value added of social science data archives

- More efficient utilization of datasets (and of public money)

- Improving the transparency of research (allows cross-checking, verification, etc of published research findings)

- Potential for secondary analysis (of findings, research design and methodology as well)

- Preservation of datafiles when technology develops and new platforms gain ground
Potential sources of data to be stored in data archives (by type of data)

Quantitative (numerical) data

• Micro Surveys (of individuals, households, firms)
• Censuses (or samples from censuses)
• Administrative (tax, pensions, social assistance, unemployment, etc) registers.

Qualitative data

• Digitalized texts, images
• Audiovisual and multimedia data
Potential sources of data to be stored in data archives (by providers)

- Government and other (central and local) official agencies
- Academic grants funded research
- Historical sources
- Market research agencies
Access to data stored in social science data archives

• Access categories determined by data depositors (who remain to be owners of the data)
• Micro data access regulated by various data protection rules, privacy protection, etc)
• Categories of users (academic, teaching, business)
• Form of access (web access, file transfer, remote statistical analysis, research room, etc)
• Data formats (statistical package formats, spreadsheets, documents)
Data Archives in Europe – members of the Council of European Social Science Data Archives (CESSDA)
Data Archives in North America and in other parts of the world
Example: the TÁRKI Data Archive

TÁRKI Data Archive stores data collections of empirical social research.

The data collections contain factographic (i.e., numerical) data.

The research data are mostly from survey research, but it also archives other factographic data collections (e.g., historical data, census, etc).

The datasets are available in digital (machine readable) format.

The data collections that contain personal data about natural persons - i.e., about real people - are anonymized.

Datasets are stored in SPSS (system and partable) and ASCII formats.

Users need special analytical tools (statistical software) and skills to use the data collections.

Some of the documentation is available only in Hungarian. Translation service to users is provided at cost.

Assistance to Hungarian users in obtaining international data collections from our partners (CESSDA, ICPSR) is provided.
Raw data:
- (household surveys, administrative data, metadata, etc)

Upgraded datasets:
- combined admin/survey data, simulation datasets

Outline: the structure of the presentation.

1. Social monitoring and social reporting

2. Data archives

3. Policy papers

Policy makers
General public
Scientific community

Scientific analytic papers
3. Reports for policy analysis and recommendations
The difficult challenges:

How to make systematic scientific knowledge accessible to policy makers?

How to present policy alternatives for decisions?

What detail shall policy papers contain to present strategic options and potential consequences and avoid details unnecessary for informed decisions?
Some key aspects of policy papers

- Defining the relevant policy problems
- Clear definition of alternatives
- Presenting evidence to back the understanding of alternatives
- Present pros and cons, intended and unintended consequences
Some ways of presenting policy relevant information to policy makers

- Policy briefs
- Strategy papers
- Project websites
An example: Communicating research results from the Social Situation Observatory (Loredana Sementini, Applica, Brussels)
Social Situation Observatory
2005-2008, 2009-2012, 2013-
Lot 2: Income Distribution and Living Conditions
Commissioned by: European Commission DG EMPL

Partners: Applica (leader, BE), European Centre (AT), ISER, Essex Univ (UK), Tárki (HU)

Task: Annual reports, research notes, seminars

Input into social reporting at the level of the whole European Union

Chapters on: income distribution, poverty, tax/transfer analysis, specific social groups (children, elderly, migrants)

Data: SILC, LFS, Euromod, ESS, EB, other surveys
Network on Income distribution and living conditions

The Social Situation Observatory was established by the European Commission in 2005 in order to monitor social trends across the EU and to analyse the factors underlying these so as to provide an input into the policy debate.

The task of the network is to analyse each year the latest data on income distribution, the risk of poverty and social deprivation across the EU and to examine major issues in this broad area and so contribute to the development of evidence-based policies.

The results of the analysis have been published in a series of Research Notes on specific issues of policy relevance as well as in the Social Situation Report. They were also published in the past in annual Monitoring Reports, but from 2010 on, the main findings of the research are available in the online resource.

The network on income distribution and living conditions is directed by Applíca in Brussels and includes the European Centre for Social Welfare Policy and Research in Vienna, Tárki in Budapest and ISER at the University of Essex in the UK. It is maintained by unit A2 Social Analysis of DG Employment, Social Affairs and Inclusion.

Click here for more information on the members of the network

SSO provided key input to High-level Conference on inequalities (5-6 Dec 2011)
Monitoring reports 2005-2009 (pdf)

- Monitoring Report 2009
- European Inequalities 2008
- European Inequalities 2008 – Country methodological notes to Chapter 8
- Monitoring Report 2007
- Monitoring Report 2007 – Executive Summary
- Monitoring Report 2006
- Monitoring Report 2006 – Executive Summary
- Monitoring Report 2005
Research findings

This online resource collects together the results of the research carried out by the Income Distribution and Living Conditions network of the Social Situation Observatory. It includes comparative analyses of income inequality, the risk of poverty, material deprivation, the distribution of wealth and non-monetary aspects of well-being across the EU, and the factors underlying these. It is based to a large extent on the EU-SILC (Statistics on Income and Living Conditions) - specifically on the published microdata - and it extends the periodic studies produced by Eurostat on various issues that can be examined by using the data. It also, however, introduces a range of other data sources that can help to increase understanding of the social situation across the EU and related developments: the European Labour Force Survey, the Survey on Health, Ageing and Retirement in Europe (SHARE), the European Household Budget Survey (EHBS), the Adult Education Survey and PISA (the survey of the academic performance of young people). In addition, it makes use of the EUROMOD microsimulation model of household income to analyse the redistributive effects of the tax-benefit system in different countries.

The focus is on analysis that is of relevance to policy-makers and that can give a more detailed and complete insight into the issues concerned, and so provide a firmer basis for the policies implemented to improve the social situation and well-being of people across the EU. The contents are updated and extended each year to reflect the most recent data available and to include new analysis undertaken by members of the network. At present, most of the analysis was carried out during 2011, except for a few sections that are based on data sources which are not updated annually (such as the special ad-hoc modules of the EU-SILC).
Research seminars

23/10/2012 - Wealth measurement (Brussels, from Oct 23, 2012 09:00 AM to Oct 23, 2012 04:00 PM)

03/10/2012 - Dynamics of Poverty (Brussels, from Oct 03, 2012 09:30 AM to Oct 03, 2012 04:00 PM)


30/11/2010 - Social Mobility (Brussels, from Nov 30, 2010 09:30 AM to Nov 30, 2010 04:30 PM)

07/05/2010 - The relative position of migrants (Brussels, from May 07, 2010 09:30 AM to May 07, 2010 04:30 PM)

20/11/2009 - Over-indebtedness (Brussels, from Nov 20, 2009 09:30 AM to Nov 20, 2009 04:30 PM)
Research Notes & Policy Briefs

Research notes, methodological papers, policy briefs.

income protection and poverty risk for the unemployed in Europe

Research note  1/2011  By Silvia Avram, Holly Sutherland, Iva Tasseva and Alberto Tumino

Abstract

Keywords:

The distributional effects of austerity measures: a comparison of six EU countries

Research note  2/2011  By Tim Callan, Chrysa Leventi, Horacio Levy, Manos Matsaganis, Alari Paulus & Holly Sutherland

Abstract

Keywords:
Summary and conclusions (1)

• Social reporting and social monitoring is very important for evidence based policy making, which is, in turn, an important ingredient of sustained societal development

• Having good quality, systematically collected micro data is an essential element of social reporting/monitoring

• To have a well functioning social reporting system, first there is a need to set up a social indicators system (focus first and issues most important for policy making). However, the indicator set shall have to be broader than simply those most evident. Otherwise trends and trend changes will not be noticed by the community...
Summary and conclusions (2)

• Launch a regular publication (in addition to its informative value, it creates natural demand for data and for evidence based policies as well).

• Institutionalize a household level survey to gather primary data on societal development

• Involve all stakeholders to gather consensus on the content, frequency, etc. so that all will understand the continuous need for indicators

• Make it useful for policy makers and make sure all stakeholders will understand it is useful.
Thank you for your attention and good luck

www.socialsituation.eu
www.tarki.hu
www.applica.be