

# Kommentar zum SOEB-Werkstattgespräch

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- Sozioökonomische Entwicklung – und Umbruchhypothese  
Ein geeigneter Bezugsrahmen für die (Sozial)Berichterstattung ?
  - Plausibilität des Konzepts, mehr als fragwürdige Metapher?
  - Umbruch = Grundlage oder Ergebnis systematischer Beobachtung und Berichterstattung?
  - Bedeutung für faktische Deskription und Analyse?
  
- Eignung des Konzepts für internationale Vergleiche  
Ein deutscher Ansatz ohne Anschlussfähigkeit?
  - das deutsche "Produktions- und Sozialmodell" der Nachkriegszeit als Referenz für eine europäische Berichterstattung?
  - Relevanz von 'Lissabon-Prozess' und 'europäischem Sozialmodell' für die Berichterstattung?

- Logik der Auswahl von Themenfeldern und Berichtsgegenständen
  - Anspruch eines 'comprehensive reporting'?
  - Konzept für die faktische Auswahl?
  
- Kohärenz und Systematik der Berichterstattung innerhalb der einzelnen Themenfelder und Gegenstände
  - welche Systematik?
  - mehr als Deskription?
  - Analyse des Zusammenhangs von Produktion und Lebensweise, bzw. ökonomischer und sozialer Entwicklung - Anspruch u. Wirklichkeit?
  
- Indikatorenbildung und -auswahl?
  - Kriterien, Systematik?
  - Innovation?
  
- Zeithorizont der Beobachtung und Berichterstattung
  - Umbruch und Entwicklung?

## Social Reporting – Some Definitions

- aims at information “on social structures and processes and on preconditions and consequences of social policy, regularly, in time, systematically, and autonomously” (Zapf 1977).
- “effort to systematically describe the level of welfare in a population” (Uusitalo 1994)
- “the description and analysis of the living conditions of the population seen in relationship to the objectives and measures of an ensemble of social policy fields” (Gilomen 1995).

## The Social Report New Zealand (2001 ff.)

- provides information on the social health and well-being of New Zealand society. Indicators are used to measure levels of well-being, to monitor trends over time, and to make comparisons with other countries.
- „Wellbeing“, in the context of this report, means those aspects of life that society collectively agrees are important for a person's happiness, quality of life and welfare
- presents information on New Zealander's living standards, health, knowledge and skills, our sense of identity and belonging; the quality and sustainability of our natural environment; the human rights that we enjoy; our ability to access meaningful and rewarding work; and our freedom from crime and violence.
- assesses how well we are performing over time, how different groups within the community are faring and how our performance compares with other OECD nations.
- enables us to think about the direction in which we are heading and to consider where concerted effort and investment may be required.
- is based on a set of key outcomes and indicators that captures the characteristics of a good society

# 2005 the social report

te pūrongo oranga tangata  
2005

indicators of social wellbeing in  
New Zealand

<b>3</b>	<b>Ministerial Foreword</b>	
<b>4</b>	<b>Chief Executive's Preface</b>	
<b>5</b>	<b>Introduction</b>	
<b>13</b>	<b>People</b>	
<b>22</b>	<b>Health</b>	
24	Health expectancy	
26	Life expectancy	
28	Suicide	
30	Prevalence of cigarette smoking	
32	Obesity	
<b>34</b>	<b>Knowledge and Skills</b>	
36	Participation in early childhood education	
38	School leavers with higher qualifications	
40	Educational attainment of the adult population	
42	Adult literacy skills in English	
44	Participation in tertiary education	
<b>72</b>	<b>Civil and Political Rights</b>	
74	Voter turnout	
76	Representation of women in government	
78	Perceived discrimination	
80	Perceived corruption	
<b>82</b>	<b>Cultural Identity</b>	
84	Local content programming on New Zealand television	
86	Māori language speakers	
88	Language retention	
<b>90</b>	<b>Leisure and Recreation</b>	
92	Satisfaction with leisure time	
94	Participation in sport and active leisure	
96	Participation in cultural and arts activities	

# contents

<b>46</b>	<b>Paid Work</b>	
48	Unemployment	
50	Employment	
52	Median hourly earnings	
54	Workplace injury claims	
56	Satisfaction with work-life balance	
<b>58</b>	<b>Economic Standard of Living</b>	
60	Market income per person	
62	Income inequality	
64	Population with low incomes	
66	Population with low living standards	
68	Housing affordability	
70	Household crowding	
<b>98</b>	<b>Physical Environment</b>	
100	Air quality	
102	Drinking water quality	
<b>104</b>	<b>Safety</b>	
106	Intentional injury child mortality	
108	Criminal victimisation	
110	Perceptions of safety	
112	Road casualties	
<b>114</b>	<b>Social Connectedness</b>	
116	Telephone and internet access in the home	
118	Participation in family/whānau activities and regular contact with family/friends	
120	Trust in others	
122	Loneliness	
124	Contact between young people and their parents	

# Basic Characteristics of Social Reporting

- ◆ Focus on Individuals and Private Households
- ◆ Output Orientation, but also policies aiming to improve welfare outcomes
- ◆ Normative Perspective
- ◆ Policy Orientation
- ◆ Empirical - Quantitative Approach
- ◆ Representativeness
- ◆ Priority of Specific Kinds of Data, in Particular Survey Data
- ◆ Continuity of Reporting Across Time

# Social Monitoring and Reporting: Why and for whom?

- to provide expert knowledge for political elites, administrations and governments
  - to provide information for research and education
  - to inform and enlighten citizens and the general public:
    - “Social Reporting should aim to satisfy the needs of citizens for information about the development of welfare” (Johansson 1976)
    - “social reporting belongs to the democratic infrastructure ... places welfare issues on the political agenda ...supplies material to the public debate, influencing the media and, indirectly, the administration”. Vogel (1990)
- ⇒ Overall: to provide empirical evidence and knowledge base for the continuous self-reflection of societies



## Why Social Monitoring and Reporting at the European Level?

- process of European integration creates needs for more and better comparative information on social conditions and structures
- improvement of living conditions and the quality of life are among the key policy goals of the European Union
- Maastricht treaty requests the presentation of social reports
- post Lisbon process places new emphasis on social indicators to be used to monitor advances in goal attainment and thus to enhance convergence and integration
- key role of social indicators and reporting in European social policy: benchmarking, best practice, open coordination

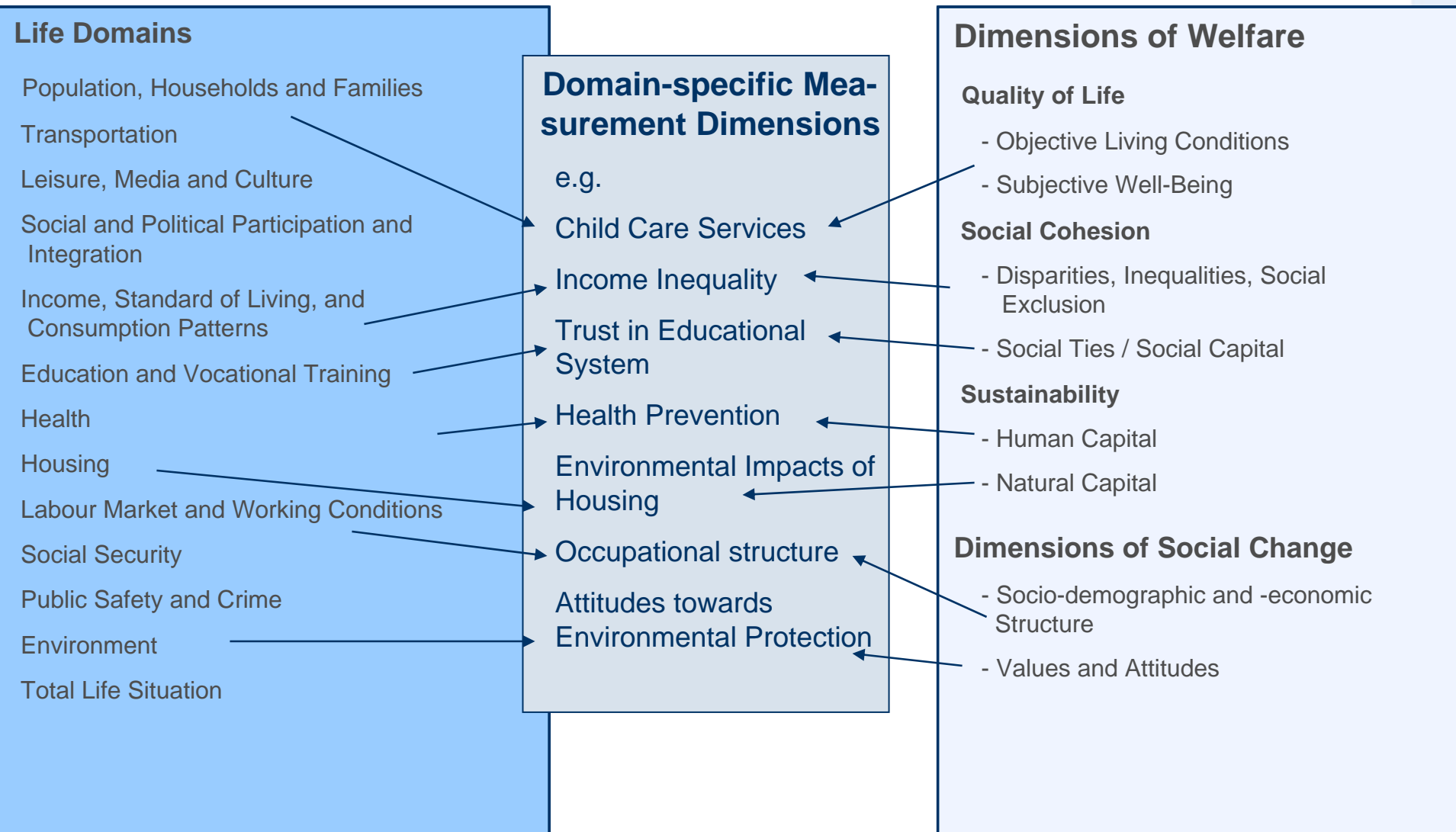
## Basic Problems faced by Social Monitoring / Reporting Programmes:

- ⇒ how to choose a limited number of subjects / dimensions of monitoring and reporting from an unlimited social universe?
- ⇒ how to organize the monitoring and reporting processes?

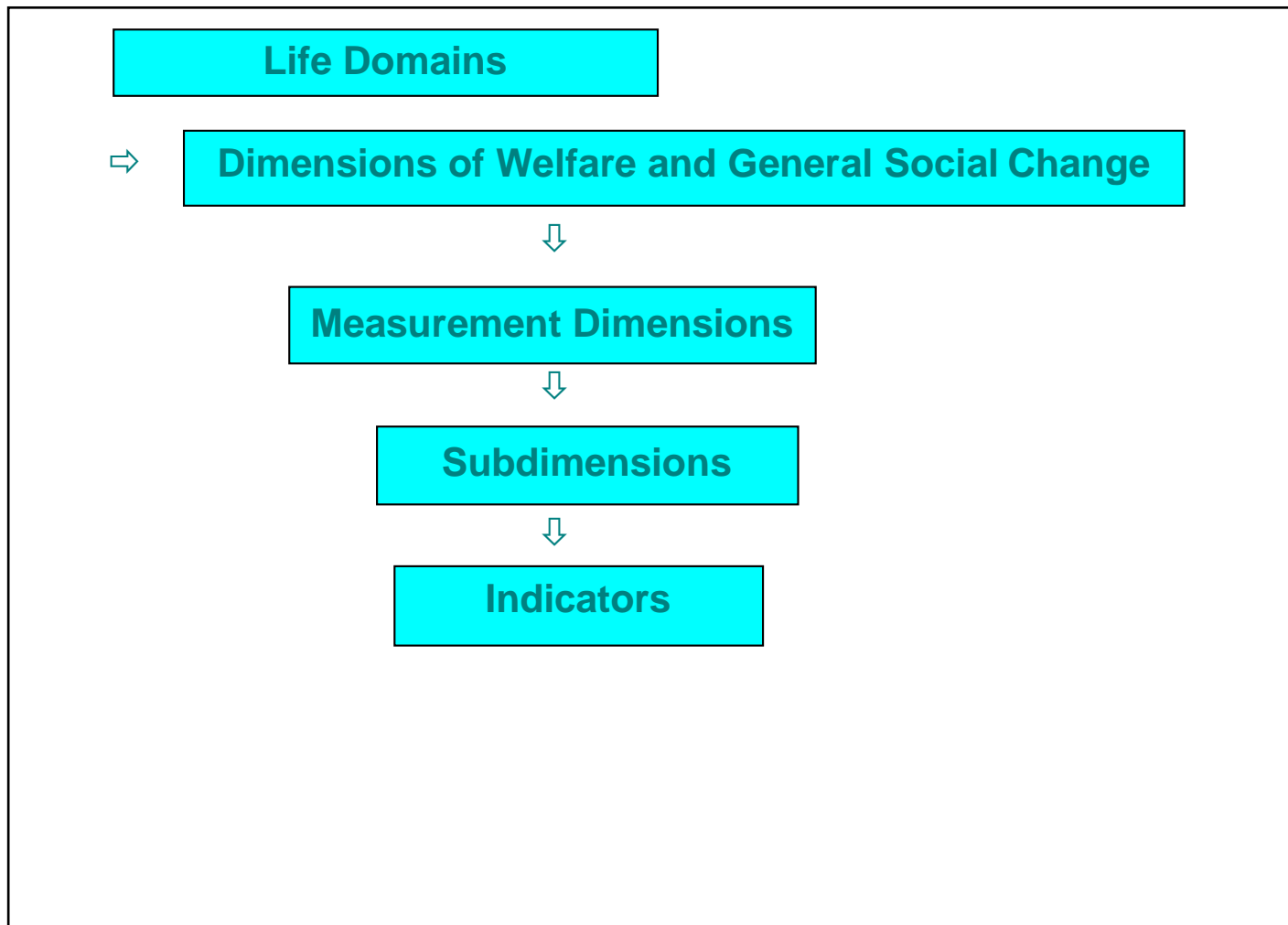
# European System of Social Indicators - Conceptual Framework

	<b>Welfare Measurement</b>	<b>Monitoring Social Change</b>
<b>Individual Level</b>	<p><b><i>Quality of Life</i></b></p> <ul style="list-style-type: none"> <li>- living conditions</li> <li>- subjective well being</li> </ul>	<p><i>Values and Attitudes</i> e.g.</p> <ul style="list-style-type: none"> <li>- postmaterialism</li> <li>- gender roles</li> <li>- party preferences</li> <li>etc.</li> </ul>
<b>Societal Level</b>	<p><i>Quality of Society</i></p> <p><b><i>Sustainability</i></b></p> <ul style="list-style-type: none"> <li>- natural capital</li> <li>- human capital</li> </ul> <p><b><i>Social Cohesion</i></b></p> <ul style="list-style-type: none"> <li>- disparities, inequalities, exclusion</li> <li>- social relations, ties, inclusion</li> </ul>	<p><i>Social Structure</i> e.g.</p> <ul style="list-style-type: none"> <li>- demographic</li> <li>- social class</li> <li>- employment</li> <li>etc.</li> </ul>

# Life Domains & Measurement Dimensions



## Dimensional Structure of the European System of Social Indicators



## Disparities, Inequalities and Social Exclusion

### Total Income Inequality

- [I3111 Income Quintile Share Ratio](#)
- [I3112 Gini Coefficient](#)

### Intergenerational Inequality of Income and Standard of Living

- Living at the Expense of Future Generations
  - [I3211 General Government Gross Debt per Capita](#)
  - [I3212 General Government Gross Debt in % of GDP](#)
- Actual Income Inequality between Generations
  - [I3221 Income Level of Children](#)
  - [I3222 Income Level of Young Adults](#)
  - [I3223 Income Level of Middle-aged People](#)
  - [I3224 Income Level of Old People](#)

### Social Exclusion

- Poverty
  - [I3311 Relative Poverty Rate I](#)
  - [I3312 Relative Poverty Rate II](#)
  - [I3313 Poverty Gap](#)
  - [I3314 Relative Poverty Rate III](#)
  - [I3315 Inability to Pay for Basic Needs](#)

[Top of page](#)

## Social Relations and Ties

### Support of People in Need of Financial Help

- Availability of Financial Support
  - [I4111 Available Help in Financial Difficulties \(Eurobarometer\)](#)
  - [I4112 Available Help in Financial Difficulties \(European Social Survey\)](#)

## Subjective Well-Being

### Cognitive Components of Subjective Well-being

Actual Well-being

[O2111a Satisfaction with Life \(EVS/WVS\)](#)

[O2111b Satisfaction with Life \(EB\)](#)

[O2112 Satisfaction with Lifestyle](#)

[O2113 Satisfaction with Society](#)

Perceived Situation Compared to the Past

[O2121 Improvement of Personal Situation Compared to the Past](#)

[O2122 Deterioration of Personal Situation Compared to the Past](#)

Expectations for the Future

[O2131 Expectation of an Improvement](#)

[O2132 Expectation of a Deterioration](#)

### Affective Components of Subjective Well-being

Pleasant Affects

[O2211 Happiness \(EVS; WVS\)](#)

[O2212 Feelings of Self-determination](#)

Unpleasant Affects

[O2221 Worries](#)

[O2222 Losing Self-confidence](#)

[O2223 Unsurmountable Difficulties](#)

[O2224 Constantly under Strain](#)

## Disparities, Inequalities and Social Exclusion

### Gender Inequality of Living Conditions

[O3111 Relative Living Conditions of Women](#)

## Human Capital

### Job-Related Health Impairments

- [H5111 Working Accidents in Manufacturing Industry](#)
- [H5112 Employees with Job-Related Health Complaints](#)
- [H5113 Absence Due to Job-related Health Complaints](#)
- [H5121 Inhalation of Unhealthy Substances](#)
- [H5122 Dangerous Conditions at the Workplace](#)
- [H5123 Perceived Health and Safety Risks at the Workplace](#)

### Promotion of Vocational Qualification

- [H5211 Internal Offers of Continuous Vocational Training](#)
- [H5212 Participation in Continuous Vocational Training](#)
- [H5221 Participation in Labour Market Training](#)
- [H5222 Public Expenditures for Labour Market Training](#)

## Natural Capital

### Consumption of Natural Resources by Economy

- [H6111 Energy Efficiency of Industry](#)
- [H6112 Efficiency of Industry Consumption of Electricity](#)
- [H6113 Efficiency of Industry Consumption of Natural Gaz](#)
- [H6114 Efficiency of Industry Consumption of Oil](#)
- [H6121 Efficiency of Industry Consumption of Water](#)

### Environmental Pollution by Economy

- [H6211 Intensity of Carbon Dioxide Emissions by Industry](#)
- [H6212 Intensity of Sulphur Oxide Emissions by Industry](#)
- [H6213 Intensity of Carbon Monoxide Emissions by Industry](#)
- [H6214 Intensity of Emissions of Particulates](#)
- [H6221 Intensity of Waste Generation by Manufacturing Industry](#)



## Additional Elements of Systems Architecture

- Indicators: objective (outcomes, resources, conditions, inputs); subjective (outcomes)
- Coverage  
25 EU - Member States + Norway, Switzerland + Japan, United States
- Periodicity of Observation  
Starting point of time-series: 1980; Yearly observations, as far as data are available
- Level of Regional Disaggregation: NUTS-1 level or similar level
- Data Sources:  
**Aggregated Data:** for example EUROSTAT - Databases  
**Microdata:** for example ECHP, LIS, Eurobarometer, ISSP, World-Value-Surveys, Working-Conditions-Surveys, Euromodule