

CONFERÊNCIA DGINS

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Discurso S. Exa. o Ministro da Solidariedade, Emprego e Segurança Social

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[SÓ FAZ FÉ VERSÃO EFETIVAMENTE LIDA]

DEAR COMMISSIONER MARIANNE THYSSEN,

DEAR ALDA CAETANO CARVALHO, INE PRESIDENTE

DEAR WALTER RADERMACHER, DIRECTOR GENERAL OF EUROSTAT

GOOD MORNING, LADIES AND GENTLEMEN

FIRST OF ALL, LET ME THANK YOU THE INVITATION TO PARTICIPATE IN THIS CONFERENCE ON SUCH TIMELY AND RELEVANT TOPIC AS THE “INDICATORS FOR DECISION MAKING AND MONITORING”, AS WELL AS THE POTENTIAL AND CHALLENGES ASSOCIATED TO IT.

THERE ARE SEVERAL CHALLENGES AND CONCERNS FROM THE POINT OF VIEW OF A DECISION-MAKER IN A WORLD OF CONTINUING ECONOMIC AND SOCIAL DEVELOPMENT AND INTEGRATION. SOCIETIES HAVE AN INCREASING DEMAND OF GOOD QUALITY AND UPDATED ANSWERS TO THE CHALLENGES POSED BY THE COMPLEXITY OF THE WORLD ECONOMY. AND ONLY WITH GOOD AND TIMELINESS INFORMATION WE CAN PROVIDE THOSE ANSWERS.

AS WE KNOW, STATISTICS AND INDICATORS PROVIDE A VALUABLE SOURCE OF EVIDENCE TO SUPPORT THE OUTLINE OF A NEW POLICY OR THE ADAPTATION OF AN EXISTING POLICY OR PROGRAM. ONCE A PROBLEM HAS BEEN IDENTIFIED, IT IS NECESSARY TO ANALYSE ITS EXTENT AND DETERMINE THE LEVEL OF URGENCY OF THE PROBLEM TO BE ADDRESSED. STATISTICS CAN HIGHLIGHT THE RELEVANCE AND SEVERITY OF THE SUBJECT IN NUMERICAL TERMS, AND THUS DEMONSTRATE THE

IMPORTANCE OF DEVELOPING POLICY OR PROGRAMMES TO ADDRESS THE ISSUE AS QUICKLY AS POSSIBLE.

SUBJECTS LIKE EMPLOYMENT, LABOUR MARKET, ECONOMIC SITUATION AND SOCIAL PROTECTION ARE SPECIALLY IMPORTANT THESE DAYS. AND STATISTICS ARE IMPORTANT THROUGHOUT ALL THE PROCESS:

IN THE FIRST PHASE – IDENTIFY AND UNDERSTAND THE ISSUE - STATISTICS CAN ASSIST POLICY MAKERS TO IDENTIFY EXISTING ECONOMIC, SOCIAL OR ENVIRONMENTAL TOPICS THAT NEED TO BE ADDRESSED. THEY ARE ALSO VITAL FOR DEVELOPING A BETTER UNDERSTANDING OF THE ISSUE BY ANALYSING TRENDS OVER TIME, OR PATTERNS IN THE DATA.

ONCE AN ISSUE HAS BEEN IDENTIFIED AND RECOGNISED AS AN IMPORTANT POLICY ISSUE, IT IS THEN NECESSARY TO DETERMINE, PREFERABLY WITH EVIDENCE-BASED, THE BEST WAY TO RESPOND. THIS STAGE REQUIRES CAREFUL AND RIGOROUS STATISTICAL ANALYSIS AND THOROUGH CONSULTATION WITH KEY STAKEHOLDERS TO ESTABLISH A CLEAR UNDERSTANDING OF THE TRUE EXTENT OF THE PROBLEM. THIS WILL HELP TO DETERMINE THE MOST APPROPRIATE POLICY OR PROGRAM OPTIONS TO ADDRESS THE ISSUE, AND THE BEST STRATEGY FOR IMPLEMENTING THESE. AS A USER OF INFORMATION, I WOULD LIKE TO STRESS THE IMPORTANCE OF TIMELY AND ACCESSIBLE INFORMATION, NOT ONLY AT NATIONAL LEVEL, BUT ALSO COMPARABLE DATA ACROSS COUNTRIES. IMPROVED CROSS-COUNTRY COMPARABILITY WOULD HELP US TO DESIGN MORE RELEVANT AND EFFECTIVE POLICIES. SO, THE AVAILABILITY OF COMPARABLE, TIMELY AND ACCESSIBLE INFORMATION TENDS TO BECOME INCREASINGLY IMPORTANT ALSO WITH THE NEED TO RESPOND QUICKLY TO THE CHANGE OF THE WORLD AND WITH THE PRESSURE FOR RESPOND WITH NEW POLICIES AND NEW AND MORE COMPREHENSIVE APPROACHES TO THE EMERGING PROBLEMS.

THEREFORE, AGAIN WE CALL FOR CONTINUATION OF GREATER EFFORTS IN THE AREA OF STATISTICS, FOR INCREASED AWARENESS OF ALL COMPETENT INSTITUTIONS IN THE COUNTRY ABOUT ITS VITAL IMPORTANCE FOR THE NATIONAL ECONOMY AND ALSO FOR SOCIETY. AS WELL AS GREATER SHARING IN THE PROVISION OF DATA BETWEEN

THE NATIONAL STATISTICAL INSTITUTE AND OTHER PUBLIC ENTITIES TO IMPROVE THE METHODOLOGIES, TO YIELD BETTER RESULTS AND CONSEQUENTLY TO HAVE BETTER POLICIES.

THE POLICY PROCESS DOES NOT END ONCE THE POLICY/PROGRAM IS UP AND RUNNING. IT IS ESSENTIAL THAT THE PROGRESS OF A POLICY/PROGRAM IS REGULARLY MONITORED AND EVALUATED TO ENSURE IT IS EFFECTIVE. AN EVALUATION OF THE SUCCESS OF THE POLICY/ PROGRAM IN QUANTIFIABLE TERMS CAN BE MEASURED AGAINST BENCHMARKS WHICH WERE ESTABLISHED AT AN EARLIER STAGE TO ACCURATELY MEASURE PROGRESS. THIS ENABLES AN ASSESSMENT TO BE MADE AS TO WHETHER THE POLICY IS MEETING INITIAL AIMS AND OBJECTIVES, AS WELL AS PROVIDING INSIGHT AND IDENTIFICATION OF AREAS THAT REQUIRE IMPROVEMENT.

SO, IN THIS CONTEXT, A MAJOR TASK IN ALL COUNTRIES IS TO CONTRIBUTE ACTIVELY TO IMPROVING THE INTERNATIONAL DATA SITUATION BY COLLECTING AND DISSEMINATING, ON A REGULAR BASIS, HIGH QUALITY DATA BUILT ON SOUND METHODOLOGIES IN LINE WITH INTERNATIONALLY AGREED STANDARDS. IN CLOSE COOPERATION WITH THE INTERNATIONAL ORGANISATIONS CONTINUOUS EFFORTS ARE REQUIRED TO IMPROVE THE RELEVANCE, AVAILABILITY, TIMELINESS, CLARITY AND ACCESSIBILITY OF DATA ON COUNTRIES AND REGIONS IN AN INTERNATIONALLY COMPARABLE WAY.

EXPERIENCE SHOWS THAT INTERNATIONAL COMPARABILITY IS NOT EASY TO ACHIEVE EVEN IF INPUT HARMONIZATION IS USED. COMPARABILITY BETWEEN COUNTRIES, FOR EXAMPLE IN THE EU, IS A JOINT RESPONSIBILITY OF THE NATIONAL STATISTICS INSTITUTES, OTHER NATIONAL AUTHORITIES AND EUROSTAT. IT IS THEREFORE IMPORTANT TO IDENTIFY AND AGREE ON STEPS IN THE SURVEY PRODUCTION PROCESS WHERE INPUT HARMONIZATION IS CRUCIAL IN ORDER TO ACHIEVE COMPARABILITY. THESE DECISIONS SHOULD BE MADE BY CONSIDERING BOTH QUALITY AND COST ASPECTS AND NATIONAL AND EU NEEDS.

I WOULD LIKE TO STRESS ALSO THE IMPORTANCE OF IMPACT EVALUATION IN THE DECISION-MAKING PROCESS AND ITS EXIGENCY IN TERMS OF DETAILED

INFORMATION. THIS TYPE OF EVALUATION SERVES BOTH OBJECTIVES OF EVALUATION: LESSON-LEARNING AND ACCOUNTABILITY. A PROPERLY DESIGNED IMPACT EVALUATION CAN ANSWER THE QUESTION OF WHETHER THE PROGRAM IS WORKING OR NOT, AND HENCE ASSIST IN DECISIONS ABOUT SCALING UP OR NOT. ONCE MORE, GOOD QUALITY DATA ARE ESSENTIAL TO GOOD IMPACT EVALUATION. THE EVALUATION DESIGN MUST BE CLEAR ON THE SOURCES OF DATA AND REALISTIC ABOUT HOW LONG IT WILL TAKE TO COLLECT AND ANALYSE PRIMARY DATA.

QUALITATIVE DATA ARE USUALLY TEXT BASED AND CAN BE DERIVED FROM IN-DEPTH INTERVIEWS, OBSERVATIONS, ANALYSIS OF WRITTEN DOCUMENTATION OR OPEN ENDED QUESTIONNAIRES AND IS INCREASINGLY USED IN SOME ANALYSES. IT ALLOWS RESEARCHERS TO EXPLORE THE THOUGHTS, FEELINGS, OPINIONS AND PERSONAL EXPERIENCES OF INDIVIDUALS IN SOME DETAIL, WHICH CAN HELP IN UNDERSTANDING THE COMPLEXITY OF AN ISSUE. QUALITATIVE INFORMATION INFORMS BOTH THE DESIGN AND INTERPRETATION OF QUANTITATIVE DATA AND CAN ALSO REINFORCE FINDINGS AND ADD DEPTH TO THEM.

SO, THE COLLABORATION BETWEEN THE VARIOUS STAKEHOLDERS WILL INVOLVE EACH PARTNER BUILDING ON AND CONTRIBUTING DIFFERENT STRENGTHS. FOR NATIONAL STATISTICAL OFFICES, TRADITIONAL STRENGTHS INCLUDE, ON THE ONE HAND, THE ABILITY TO COLLECT DATA AND COMBINE DATA SOURCES WITH STATISTICAL PRODUCTS AND, ON THE OTHER HAND, THEIR FOCUS ON QUALITY, TRANSPARENCY, SOUND METHODOLOGY AND TIMELINESS.

LADIES AND GENTLEMAN,

LET ME ALSO SHARE MY OPINION ON THE RELEVANCE OF INDICATORS TO THE POLICY-MAKING AND DECISION-MAKING PROCESS.

AS WE KNOW, POLICY MAKING – THE PROCESS BY WHICH GOVERNMENTS MAKE DECISIONS TO SOLVE THE PROBLEMS AND IMPROVE SOCIO-ECONOMIC CONDITIONS – IS NO SINGLE AND UNIFORM ACTIVITY OF THE GOVERNMENT. IN THE RECENT YEARS THERE HAS BEEN A TREND TO DEFINING CLEAR OBJECTIVES AND TARGETS OF POLICIES AND MEASURING THEIR PERFORMANCE IN TERMS OF ACHIEVING THEM. WITHIN THIS

PROCESS, INDICATORS ARE A CENTRAL TOOL TO ASSESS THE EFFECTIVENESS OF POLICIES.

AS I SAID BEFORE, WITHIN THE POLICY-MAKING PROCESS, AND FROM THE POINT OF VIEW OF A DECISION-MAKER, DATA AND INDICATORS CAN PLAY SEVERAL RELATED BUT DISTINCT FUNCTIONS. IN THEIR MOST BASIC PURPOSE, THEY PROVIDE INFORMATION ABOUT THE “STATE OF ART” IN A POLICY FIELD OR DOMAIN. IN THIS CONTEXT, EX-ANTE EVALUATIONS ARE ESSENTIAL FOR DECISION-MAKERS TO WEIGHT, DESIGN AND DECIDE ABOUT EFFECTIVE POLICY INTERVENTIONS. IN THIS CONTEXT, WE STRESS THE IMPORTANCE OF ALL INFORMATION (QUANTITATIVE AND QUALITATIVE) AND OF INDICATORS.

THE WORD “INDICATOR” IS DERIVED FROM THE LATIN “INDICARE”, WHICH MEANS TO ANNOUNCE, POINT OUT OR INDICATE. THE ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT (OECD) HAS DEFINED AN INDICATOR AS “A PARAMETER, OR A VALUE DERIVED FROM PARAMETERS, WHICH POINTS TO/PROVIDES INFORMATION ABOUT/DESCRIBES THE STATE OF A PHENOMENON/ENVIRONMENT/AREA WITH A SIGNIFICANCE EXTENDING BEYOND THAT DIRECTLY ASSOCIATED WITH A PARAMETER VALUE”.

AS WE CAN SEE, INDICATORS FORM PART OF INFORMATION SYSTEMS, BUT THEY ARE DISTINCT FROM STATISTICS AND FROM PRIMARY DATA. IN THAT WAY THEY REPRESENT MORE THAN THE DATA ON WHICH THEY ARE BASED. INDICATORS CAN PLAY AN IMPORTANT ROLE IN TURNING DATA INTO RELEVANT INFORMATION FOR DECISION-MAKERS, BUT ALSO FOR THE PUBLIC IN GENERAL. IN PARTICULAR, THEY CAN HELP TO SIMPLIFY, A SOMETIMES, COMPLEX RANGE OF INFORMATION. IN THAT SENSE, THEY PLAY AN IMPORTANT ROLE IN IMPROVING COMMUNICATION BETWEEN THE PUBLIC AND DECISION-MAKERS, AND MAY CONTRIBUTE TO IMPROVED MANAGEMENT, POLICY DEVELOPMENT AND, THEREFORE, THEY MIGHT CONTRIBUTE TO STRENGTHEN POPULATION WELL-BEING.

BESIDES THE DECISION, INDICATORS HAVE ANOTHER FUNCTION. THEY SERVE TO MONITOR THE CONSEQUENCES OF POLICY INTERVENTIONS AND TO SHOW THE

PROGRESS TOWARDS PREDEFINED POLICY OBJECTIVES AND TARGETS. OBVIOUSLY, ALL THESE FUNCTIONS ARE INTERLINKED TO EACH OTHER. NEVERTHELESS, INDICATORS THAT MONITOR POLICY INTERVENTIONS AND PERFORMANCE OF POLICIES HAVE TO SATISFY ADDITIONAL REQUIREMENTS, SUCH AS CORRESPONDING TO THE OBJECTIVES OF THE POLICY THEY ARE SUPPOSED TO MONITOR. IN THAT SENSE, THE INDICATORS ARE INSTRUMENTS TO ENSURE THAT POLICIES ACHIEVE THE DESIRED OUTCOMES. BY DEFINITION, POLICIES SHOULD BE OUTCOME ORIENTED. SO, THE INDICATORS PROVIDE A “SYNTHESIZED” VIEW OF EXISTING CONDITIONS AND TRENDS WHICH CAN BE USED IN DECISION MAKING. DURING SUCH PROCESS, INDICATORS AND OTHER INFORMATION ARE IMPORTANT TO MAKE ADJUSTMENTS AND CORRECTIONS, IF IT IS NECESSARY.

INDICATORS THAT MONITOR POLICIES ARE SUPPOSED TO PROVIDE INFORMATION ABOUT THEIR EFFECTIVENESS. USUALLY, EVERY POLICY HAS AN OBJECTIVE BUT IT IS NOT ALWAYS MADE EXPLICIT. EVEN IF EXPLICIT POLICY OBJECTIVES EXIST, THEY ARE NOT ALWAYS CLEAR ABOUT THE OUTCOME THAT THEY AIM TO INFLUENCE OR TO DEAL WITH. THE MORE EXPLICIT POLICY OBJECTIVES ARE IN THIS RESPECT, THE EASIER IT IS TO DEVELOP APPROPRIATE OUTCOME INDICATORS. IT IS NEVER POSSIBLE IN ADVANCE TO SAY WITH A HIGH DEGREE OF CERTAINTY WHAT WILL BE THE EXACT EFFECTS OR IMPACTS OF A POLICY. EVEN POLICIES THAT HAVE BEEN TRIED IN THE PAST, OR IN ANOTHER COUNTRY, CAN HAVE DIFFERENT EFFECTS THAT BEFORE WHEN SEEMINGLY UNRELATED CIRCUMSTANCES HAVE CHANGED IN THE MEANTIME. THERE IS NO ONE FITS ALL SOLUTION!

BEYOND THEIR IMMEDIATE TASK OF INFORMING POLICY-MAKERS, INDICATORS CAN FURTHER CONTRIBUTE TO CREATE TRANSPARENCY AND ACCOUNTABILITY. BUT IN GENERAL, MODERN POLICIES HAVE SUCH COMPLEX EFFECTS AND ARE SO STRONGLY INTERDEPENDENT THAT THEIR EXACT CONSEQUENCES CAN NEVER BE PREDICTED THEORETICALLY. THEREFORE, POLICIES HAVE TO BE MONITORED AND EVALUATED TO DETERMINE WHAT THEIR EFFECTS ARE. WITHOUT SYSTEMATIC MONITORING AND EVALUATION, IT IS ALMOST IMPOSSIBLE TO SEPARATE POLICIES THAT WORK WELL FROM THOSE THAT DO NOT. PROVIDING INFORMATION THAT IS RELEVANT TO POLICY-

MAKING WITHIN CONSTRAINTS OF TIME AND OTHER FACTORS, AND IN A FORM WHICH ALL THOSE INVOLVED CAN APPRECIATE AND ACCEPT IS A MAJOR CHALLENGE, REQUIRING THE SELECTION OF INFORMATION THAT IS DIRECTLY RELEVANT TO THE TASK AT HAND AND NECESSITATING TRANSLATION OF THIS INFORMATION INTO A CONSISTENT AND COHERENT FORM.

THE DIALOGUE BETWEEN THE “POLITICIANS” AND THE “EXPERTS” COULD BE SOMETIMES DIFFICULT BUT IT IS FRUITFUL, LEADING ON TO THE IMPROVEMENT OF THE STATISTICAL INFORMATION AND, ON THE OTHER HAND, TO THE SELECTION OF FEASIBLE INDICATORS.

DIFFERENT TYPES OF DECISIONS AND ISSUES REQUIRE DIFFERENT TYPES AND LEVELS OF INDICATORS. TO BE REALLY USEFUL, INDICATORS SHOULD BE APPLICABLE TO THE USER AND NOT JUST TECHNICALLY RELEVANT OR RELEVANT TO THE DATA PROVIDERS. THE CHOICE OF INDICATORS WILL DEPEND ON SUCH FACTORS AS THE PURPOSE FOR THEIR USE AND THE TARGET AUDIENCE. AS STATED EARLIER, INDICATORS CAN BE USED FOR PROBLEM DEFINITION, POLICY FORMULATION, POLICY IMPLEMENTATION AND EVALUATION. SOMETIMES THE SAME INDICATORS MAY SERVE MANY PURPOSES, WHILE IN OTHER SITUATIONS SEPARATE SETS OF INDICATORS MAY BE NEEDED.

MANY ORGANIZATIONS HAVE ATTEMPTED TO DEFINE CRITERIA FOR THE CONSTRUCTION AND SELECTION OF INDICATORS, DEPENDING ON WHETHER THEY APPLY TO POLICY, ANALYTICAL SOUNDNESS OR MEASURABILITY. THEY MAY ALSO BE ASSESSED IN RELATION TO FACTORS SUCH AS TRANSPARENCY, SCIENTIFIC VALIDITY, ROBUSTNESS, SENSITIVITY AND THE EXTENT TO WHICH THEY ARE LINKABLE. INDICATORS MUST BE AS SPECIFIC AND PRECISE AS POSSIBLE WITH RESPECT TO A PARTICULAR SUBJECT, IN ORDER TO MAXIMIZE THE USEFULNESS OF THE INFORMATION FOR DECISION-MAKING. INDICATORS SHOULD ALSO BE SCIENTIFICALLY CREDIBLE, UNBIASED AND REPRESENTATIVE OF THE CONDITION CONCERNED.

IN SOME CASES WE NEED A METHODOLOGY THAT EXAMINES SIMULTANEOUSLY THE TREND IN THE LEVELS AND THE CHANGES OF THE INDICATORS IS MUCH MORE

APPROPRIATE FOR ANALYSING LABOUR MARKET AND SOCIAL DEVELOPMENTS AND PROVIDES A TRANSPARENT AND SIGNIFICANT ASSESSMENT.

THE ASPECT OF REPRESENTATIVENESS IS PARTICULARLY IMPORTANT WHEN DESCRIPTIVE INDICATORS ARE USED TO OBTAIN BASELINE INFORMATION IN A PARTICULAR SETTING. INDICATORS SHOULD BE CONSISTENT AND COMPARABLE, IN BOTH TIME AND SPACE, AND SHOULD BE RELATIVELY UNAFFECTED BY SMALL DIFFERENCES IN METHODS AND MEASUREMENT TECHNIQUES THAT MAY OCCUR IN THE VARIOUS CONTEXTS AND SETTINGS IN WHICH INFORMATION IS COLLECTED. INTERNATIONAL DATA COOPERATION IS HIGHLY IMPORTANT IN THE PROCESS OF MAKING TIMELY AND CONSISTENT DATA ON COUNTRIES AND REGIONS AVAILABLE AT THE NATIONAL AND INTERNATIONAL LEVELS.

IN MAKING SPACE FOR EVIDENCE-BASED POLICIES, THE ROLE OF EVALUATION FRAMEWORK IS KEY. HIGH-QUALITY, MULTI-DIMENSIONAL EVALUATION IS A FEATURE OF PUBLIC EXPENDITURE AND REGULATORY POLICY, ALTHOUGH THE PROCESS ARE AT VARYING STAGES OF DEVELOPMENT.

CONCERNING EMPLOYMENT AND SOCIAL POLICIES, INDICATORS ARE MAINLY A WAY TO MONITOR PROGRESS TOWARDS ESTABLISHED OBJECTIVES AND TARGETS.

AT AN INTERNATIONAL LEVEL THERE HAS BEEN CARRIED OUT A LOT OF WORK IN THE SOCIAL AND EMPLOYMENT FIELD, NOT ONLY UNDER THE EUROPEAN COMMISSION, BUT ALSO UNDER UNITED NATIONS – UNECE, ILO AND MUNDIAL BANK , FOR INSTANCES (MILLENNIUM OBJECTIVES). THE WORK CARRIED OUT BY THOSE ORGANIZATIONS HAD PUT INTO THE DEBATE THE NEED FOR A BETTER AND ROBUST FRAMEWORK OF SOCIAL INDICATORS.

AT EUROPEAN LEVEL, ONE OF THE MAIN ACHIEVEMENTS OF THE OPEN METHOD OF COORDINATION (THE MAIN POLICY FRAMEWORK IN THE FIELD OF EU EMPLOYMENT AND SOCIAL PROTECTION IS THE EUROPE 2020 STRATEGY AND THE OPEN METHOD OF COORDINATION FOR SOCIAL PROTECTION AND SOCIAL INCLUSION) HAS BEEN THE DEVELOPMENT OF EU INDICATORS IN THE AREAS OF SOCIAL INCLUSION AND SOCIAL PROTECTION. ON THE OTHER SIDE, AND COMPLEMENTARILY THE EUROPEAN

STRATEGY HAD LED TO THE DEVELOPMENT OF SEVERAL TOOLS IN THE INDICATORS FIELD.

THE WORK CARRIED OUT ON CONCERNING INDICATORS IN THE EMPLOYMENT AND SOCIAL FIELD HAS BEEN DEVELOPED IN THE CONTEXT OF THE INDICATORS GROUP OF THE EMPLOYMENT COMMITTEE AND INDICATORS SUBGROUP OF SOCIAL PROTECTION COMMITTEE, RESPECTIVELY.

SINCE THE FIRST LIST OF COMMON INDICATORS ADOPTED, THE STATISTICS HAS CONTINUOUSLY IMPROVED, AS WELL AS DATA COLLECTION AND POLICY NEEDS, IN THE CONTEXT OF THE REFERRED GROUPS AND IN COOPERATION WITH EUROSTAT; OECD AND EXPERTS.

IN FACT SOCIAL INDICATORS USED TO BE LESS SYSTEMATIZED, TIMELESS, WHEN COMPARED WITH THE ECONOMIC ONES. INTERNATIONALLY COMPARABLE DATA FOR MONITORING THE ECONOMIC SITUATION AND TRENDS HAVE BEEN COLLECTED FOR ABOUT HALF A CENTURY, ON THE OTHER HAND AND UNTIL FEW YEARS AGO WE CAN SAY THAT, EQUIVALENT TOOLS FOR MONITORING SOCIAL CONDITIONS WERE STILL IN THEIR INFANCY.

IN THE CONTEXT OF THE OPEN METHOD OF COORDINATION THE SOCIAL PROTECTION COMMITTEE, INDICATORS SUB-GROUP (ISG) HAS AGREED ON A BROAD COMMON METHODOLOGICAL FRAMEWORK FOR THE DEVELOPMENT OF EU SOCIAL INDICATORS PORTFOLIO. IN PORTUGAL AND IN ACCORDANCE WITH THE WORK CARRIED AT EUROPEAN LEVEL AND IN THE CONTEXT OF A PROCESS THAT BEGAN WITH THE PAST STRATEGIES FOR SOCIAL PROTECTION AND SOCIAL INCLUSION, A SELECTION OF INDICATORS (FOLLOWING THE FORMAT THAT HAVE BEEN ACCORDED IN THE CONTEXT OF EUROPEAN COMMISSION) HAS BEEN AVAILABLE IN ORDER TO MONITOR THE STRATEGY DESIGNED.

IN FACT ALL THE PROCESS OF MONITORING AND EVALUATING WAS BASED ON A MONITORING SYSTEM SUPPORTED BY :I) STRUCTURAL INDICATORS, WHICH ENABLE COMPARISONS WITH OTHER MEMBER-STATES; II) RESULT INDICATORS WITH

REGARD TO EACH OF THE PRIORITIES AND GOALS ESTABLISHED IN THE PLAN AND III) INDICATORS TO MONITOR THE IMPLEMENTATION OF POLICY MEASURES.

MEANWHILE, THE EU EMPLOYMENT AND SOCIAL INDICATORS ARE USED IN VARIOUS CONTEXTS AS: I) MONITORING THE EUROPE 2020 TARGETS; II) PREPARING THE EUROPEAN SEMESTER; III) IDENTIFYING THE KEY TRENDS TO WATCH IN THE EU THROUGH THE EMPLOYMENT AND SOCIAL PROTECTION PERFORMANCE; V) VI) FOR THEMATIC REPORTS ON RELEVANT TOPICS SUCH AS PENSIONS ADEQUACY IN THE EU, CHILD POVERTY AND WELL-BEING; VII) FOR EU-LEVEL ANALYTICAL WORK IN THE FIELD OF EMPLOYMENT AND SOCIAL POLICY AND OTHERS.

TODAY THE EU SOCIAL INDICATORS ARE ORGANIZED BY POLICY AREA, ACCORDING WITH THE STRATEGY DESIGNED. FOR EXAMPLE: I) EUROPE 2020 POVERTY AND SOCIAL EXCLUSION TARGET; II) III) SOCIAL INCLUSION; IV) PENSIONS; V) HEALTH CARE AND LONG-TERM CARE.

AT A NATIONAL LEVEL, WE MAKE USE OF THOSE INDICATORS NOT ONLY UNDER THE ELABORATION OF NATIONAL PROGRAM REFORM, BUT ALSO UNDER THE NATIONAL SOCIAL REPORT, AND MAINLY TO ASSESS THE PROGRESS ACHIEVED WITH THE IMPLEMENTATION OF OUR SOCIAL POLICIES. THIS IS ABSOLUTELY ESSENTIAL TO ENSURE THE EFFECTIVENESS AND EFFICIENCY OF OUR STRATEGY AGAINST INEQUALITIES AND SOCIAL EXCLUSION, IN ORDER TO PROTECT THOSE WHO ARE MORE VULNERABLE.

THE INDICATORS USED CURRENTLY TO MONITOR THE COMBAT POVERTY AND SOCIAL EXCLUSION, ONLY TAKES INTO ACCOUNT THE INCOME EARNED OR TRANSFERRED DIRECTLY TO FAMILIES AND INDIVIDUALS. NOTWITHSTANDING WE ARE AWARE THE FACT THAT WE NEED ALSO TO IMPROVE SOME INDICATORS, IN SOME FIELDS, MAINLY THOSE WHO ARE RELATED WITH NON-INCOME MEASURES, THAT ARE NOT REFLECTED BY THE 'OFFICIAL INDICATOR OF POVERTY'. SO THERE IS STILL A LOT TO DO IN WHAT CONCERNS IMPROVING INDICATORS.

SO SOME SUPPORTS PROMOTED BY THE STATE, SUCH AS THE LEVEL OF SOCIAL FACILITIES, ASSESS TO QUALITY SERVICES, SOCIAL ASSISTANCE SERVICES, LONG-TERM

CARE SERVICES AMONG OTHERS, ARE NOT TAKEN INTO ACCOUNT. FOR INSTANCE, TRANSFERS TO SUPPORT THE POPULATION THAT ARE IN INSTITUTIONS ARE NOT CONSIDERED AS INCOME OF INDIVIDUALS OR FAMILIES, BUT ARE OBJECTIVELY IMPORTANT COMPONENTS OF POVERTY REDUCTION.

FOR INSTANCE: PORTUGAL INVESTS EVERY YEAR 1,4 BILLION EUROS ON SOCIAL FACILITIES VACANCY SUPPORT.

WE CO-FINANCE, DEPENDING ON THE FAMILY INCOME, SOCIAL RESPONSE FOR THE ELDERLY, FOR THE CHILDREN, FOR THE POOREST WHO DON'T HAVE A PLACE TO SLEEP OR A TABLE TO EAT FOR YOUNGSTERS IN JEOPARDIZE, FOR DISABLED PEOPLE, AND SO MANY OTHERS.

TO BUILD SUCH A SOLIDARITY NET WE RELY ON THE SOCIAL ECONOMY SECTOR AND AMONG WITH THEM WE FIGHT POVERTY IN A MUCH MORE EFFECTIVE WAY, IN A SPIRIT OF COMPLEMENTARITY AND SUBSIDIARITY.

1,2 BILLION WHO PRODUCE A REAL POSITIVE EFFECT ON POVERTY AND SOCIAL EXCLUSION REDUCTION BUT THAT HARDLY ARE ESTIMATED ON THE STATISCAL RADAR.

BUT IT HAS TO BE. BECAUSE IT ALSO REPRESENTS WHAT EUROPE SOCIAL MODEL HAS OF ITS BEST.

IS TRUE THAT THE EUROPEAN UNION HAS A POWERFUL TOOL FOR MONITORING THE SOCIAL SITUATION AND TRENDS ACROSS ALL MEMBER STATES AND THUS FOR SUPPORTING THE DEVELOPMENT OF BETTER SOCIAL POLICIES THROUGH THE OPEN METHOD OF COORDINATION. IN FACT, ALSO IN STATISTICAL FIELD OVER THE PAST DECADE, THE EUROPEAN UNION HAS MADE MAJOR PROGRESS IN PRODUCING INTERNATIONALLY COMPARABLE DATA FOR SOCIAL MONITORING. WITH EU-SILC THE EUROPEAN UNION HAS A MUCH IMPROVED TOOL FOR MONITORING THE SOCIAL SITUATION AND TRENDS. IT USES LARGER SAMPLES, ALLOWING MORE DETAILED ANALYSIS OF THE CHARACTERISTICS OF THE MOST VULNERABLE HOUSEHOLDS.

MEANWHILE, THE TIME LAG BETWEEN COLLECTION OF DATA AND PUBLICATION HAS BEEN BEING REDUCED (PORTUGAL SHOULD BE POINTED OUT LIKE ONE OF THE

COUNTRIES THAT MOST PROGRESSED IN THE LAST TWO YEARS CONCERNING THIS ISSUE) IN ORDER TO OVERCOME A SITUATION WHERE THE AVAILABILITY OF SOCIAL DATA LAG WAS CONSIDERABLY BEHIND KEY ECONOMIC INDICATORS.

WITHOUT INTERNATIONALLY COMPARABLE DATA ON THE SOCIAL SITUATION AS BY PRODUCED EU-SILC, KEY POLICY DEVELOPMENTS IN THE EUROPEAN UNION WOULD NOT HAVE BEEN POSSIBLE. A MAJOR BREAKTHROUGH IN THIS REGARD HAS BEEN THE ESTABLISHMENT OF OMC IN WHICH MEMBER STATES AGREED ON COMMON OBJECTIVES AND INDICATORS FOR MONITORING PROGRESS TOWARDS THESE OBJECTIVES IN THE FIELD OF SOCIAL PROTECTION AND SOCIAL INCLUSION. MOST OF THE INDICATORS THAT WE HAVE ALREADY REFER TO RELY ON THE EXISTENCE OF INTERNATIONALLY HARMONIZED SURVEYS ON INCOMES AND LIVING CONDITIONS SUCH AS THE EU-SILC.

ONE VALUE ADDED OF A WELL-ESTABLISHED FRAMEWORK OF INDICATORS IS THE POSSIBILITY TO EVALUATE OUR POLICIES. WE FOUND THE ASSESSMENT VERY RELEVANT BECAUSE THE STRATEGY MUST HAVE A REAL IMPACT ON THE IMPROVEMENT OF THE QUALITY OF LIFE IN PORTUGAL ESPECIALLY FOR THE MOST VULNERABLE.

THIS CAN BE DONE BY IDENTIFYING THE RELEVANT INDICATORS AMONG THOSE THAT ARE ALREADY PART OF THE PORTFOLIOS OF AGREED INDICATORS TO MONITOR THE SOCIAL OMC AND THE EUROPEAN EMPLOYMENT STRATEGY, AND BY DEVELOPING NEW INDICATORS WHERE NEEDED.

A TIMELY ADOPTION OF GROUND-BREAKING MEASURES TO PRESERVE EMPLOYMENT AND SOCIAL COHESION, BASED ON EFFECTIVE MONITORING OF THE IMPACT OF THE ECONOMIC CRISIS, IS CRUCIAL IN THE FACE OF ADVERSE EFFECTS OF THE PRESENT FINANCIAL CRISIS ON THE REAL ECONOMY SUCH AS THE FORECASTED RISING UNEMPLOYMENT.

IT IS VERY IMPORTANT TO CARRY ON WITH ANALYTICAL WORK, IN ORDER TO IMPROVE STATISTICS MAINLY SOCIAL STATISTICS THROUGH THE DEVELOPMENT OF

SURVEYS AND TO EXPLORE ADMINISTRATIVE TOOLS IN ORDER TO DISPOSABLE OF ROBUST AND UPDATE INDICATORS FRAMEWORK.

IT IS CRUCIAL THAT WE CONTINUE MONITORING AND ANALYSIS OF THE 2020 EMPLOYMENT, POVERTY AND SOCIAL EXCLUSION HEADLINE TARGET, BUT ALSO IMPROVING THE AVAILABLE INDICATORS TO MONITOR OTHER DIMENSIONS THAT NOT ONLY THE MONETARY ONES.

WE ALSO SUPPORT THE WORK THAT HAS BEEN CARRIED OUT BY THE TECHNICAL GROUPS UNDER EUROPEAN COMMISSION TO MONITOR AND ANALYSE SOCIAL SPILLOVERS, AND EXPLORE STRENGTHENING THE ABILITY TO ANALYSE THE LINK BETWEEN SOCIAL POLICY AND ECONOMIC POLICY.

TOOLS LIKE THE SOCIAL PROTECTION PERFORMANCE MONITOR AND THE EMPLOYMENT MONITOR SHOULD BE BROUGHT TOGETHER, ALSO IN THE CONTEXT OF EUROPEAN SEMESTER.

DESPITE THE EFFORTS THAT HAVE BEEN DONE, AND APART FROM THE USE THAT COULD BE MADE OF NOWCASTS, IT IS CRUCIAL TO CARRY ON IMPROVING THE TIMELINESS OF SOCIAL STATISTICS. FRESH DATA ON THE SOCIAL SITUATION OF HOUSEHOLDS IS ESSENTIAL FOR POLICY FORMULATION AND MONITORING, IN PARTICULAR IN TIMES OF CRISIS.

WE HAVE SEVERAL AND DIFFERENT CHALLENGES THAT NEED TO ATTEND AND DIFERENT ANSWERS GIVEN THAT NEED TO BE MONITORED.

BENCHMARKING, COOPERATING WE CAN IMPROVE THE INDICATORS FOR BETTER DECISIONS AND MONITORING. I'M SURE IT IS ONE OF THIS CONFERENCE PURPOSES. AND THAT IT WILL BE ACHIEVED IN THE FUTURE.

THANK YOU.