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**FINAL REPORT ON THE PROJECT ON INTEGRATION AND HARMONIZATION
OF INSTRUMENTS FOR SOCIAL STATISTICS (INAES)***

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INTRODUCTION

This document contains the final report on the Project on integration and harmonization of instruments for social statistics (INAES). Under the INAES project, a database was developed and an assessment was made of the status of the region's social statistics on the labour market, health and education, as well as of the production of indicators. This made it possible to identify gaps between countries with regard to specific statistical standards and to determine the extent to which national practices are consistent with the international recommendations enshrined in standards.

The database and the assessment of the status of labour-market, health and education statistics are considered regional public goods that provide comprehensive, detailed information on the current state of harmonization and levels of comparability and quality of statistical production in the region's social sector. Accordingly, the outputs of the INAES project are considered the baseline, or phase 0, of the chain of actions and activities to be conducted as part of the harmonization process. Based on this first step, the proposal is to continue the process by implementing an integrated strategy that leads to the harmonization of social statistics by enhancing comparability in the region, both in terms of data and quality.

The INAES project experience indicates that harmonization should be understood as a complex, permanent, ongoing process, not as a one-time or final action. Likewise, the experiences with collecting information and the results of the seminars show that the harmonization process tends to be difficult and slow and that it requires, above all, a high degree of participation by the countries and flexible procedures.

It is necessary to bring about a shift in the traditional process and direction of harmonization and promote national initiatives and active participation by countries in regional and international harmonization processes. In addition, international recommendations should reconcile the needs for international comparison with the importance of national level data, and they should be formulated based on greater participation by national institutions and integrated cooperation and technical assistance from specialized international agencies.

Under the initial proposal of INAES,¹ the countries have had successful experiences, have been able to amass significant statistical capital and have learned to construct various instruments, as well as their own methodologies and technical procedures, including those related to quality control. Accordingly, the next task is to systematize these achievements and develop mechanisms that help incorporate and disseminate best practices, making them available to the region.

This proposal is expected to make an impact on the various obstacles that are hindering the development of a body of harmonized, comparable statistics and enhanced quality levels. It will be possible to corroborate that impact through sub-outputs, such as basic sets of indicators developed on the basis of common methodologies and procedures, the participation of the countries and the consolidation of an institutional framework and national and regional cooperation.

¹ Documentation form for the IDB project Improvement of Statistics for Measuring Living Conditions (ATN/OC-9256-RG).

I. PRINCIPAL CONCLUSIONS OF THE PROJECT

A. CROSSCUTTING CONCLUSIONS

There is no regional statistical institutional framework for harmonization and no clear definition of the role of national statistical institutes and their channels of communication and engagement with international agencies working in specific sectors. This suggests that conceptual and the methodological gaps exist between regional sector statistics and national interests, with the definitions set forth by the sectoral agencies appearing to prevail somewhat over regional and national interests.

To achieve consensus-based harmonization, the integration process should be inverted and start with the countries and their interests and priorities. Along these lines, the international agencies should serve as support for regional consensus.

The ability of national institutions to produce sector statistics faces particular constraints in the health and education sectors, inasmuch as the statistical output of the ministries in these sectors tends not to mesh, conceptually or operationally, with that of national statistical institutes.

Sector statistics should be integrated into a national statistical system in which the national statistical institute handles the various aspects of harmonization and quality assurance. On that basis, it is necessary to foster national consensus on statistical standards. Some problems in this regard are described below:

- Lack of agreement on minimum sets of sector indicators, although this does not prevent each country from having a broad group of sector indicators.
- Heterogeneity in the production of statistics (methodology and procedures).
- Differences in statistical technical capacity among and within countries.
- Diversity of sources and formats and in their use in the different countries.

B. SECTOR CONCLUSIONS

1. Labour-market component

With regard to labour-market statistics, countries and international agencies and organizations (the International Labour Organization, the United Nations) have made major efforts directed at harmonization, but these have been insufficient in view of present comparability and quality needs arising from recent economic, social and cultural events and global and regional changes. Also, the efforts have been uneven. In many cases, the emphasis has been placed more on concepts and classifications than on harmonization of data collection, processing and aggregation processes, which means that striking differences and gaps in terms of quality and representativeness persist. A good number of countries have adopted notable new quality assurance measures, but these are not tied in practice or in the institutional framework to processes aimed at achieving more structural and meaningful harmonization.

Consistency in the use and application of international standards to the production of labour-market indicators is varied, uneven, and heterogeneous. A small group of resolutions have been adopted

by all or most of the countries and another group have been applied to varying degrees or used in some aspects. For example, several countries have not adopted the 1985 Labour Statistics Convention (Article 1), which serves as a frame of reference and general definition (binding) for the development of labour statistics. This convention covers different dimensions, including the economically active population, employment, and visible underemployment.

The resolution adopted by the thirteenth International Conference of Labour Statisticians, held in 1982, which established the concepts of economically active population, labour force (the currently active population), employment and unemployment, is the basic conceptual and methodological frame of reference adopted and adapted by all of the countries. However, the resolution is manifestly outdated with regard to the significant changes that have taken place in economic policy (deregulation, liberalization, and privatization), labour policy (flexible hiring and the workday), productive and technological restructuring, the new division of labour and the financial crisis. The countries interpret the standards set forth in this resolution and apply them to their realities in very different ways, based on criteria that are hard to compare.

The non-application or incorrect application of standards leads to underestimates or overestimates of the data, which significantly impacts comparability. Classifications are affected by, among other factors, the establishment of age limits, the inclusion or exclusion of groups based on age, area of residence, activity, occupation and position, the use of overly broad concepts and definitions that can be interpreted in a range of ways, serious constraints on the application of activity status and inadequate definition of activities (System of Nations Accounts-SNA, 1993), consideration of length of employment and the reference periods adopted.

There are many problems associated with the production of harmonized labour-market indicators related to the different levels and dimensions of harmonization and the need to guarantee the stability and spatio-temporal comparability of national-level series. Also, the limitations and obstacles faced by countries that wish to move forward with harmonization processes have come to light.

Diversity and heterogeneity do not occur only in statistical processes and data, but also mark traditions, trajectories, practices and institutional frameworks. Levels of heterogeneity are expressed in the various approaches taken to understand and work with the different levels and dimensions of harmonization and in the responses to the requirements of subregional and international agencies.

Participation in the development of international standards is rather a formality that is bound up with the international agencies. In general, the countries are not intimately familiar with the scope of the standards and see them as something that comes from outside and is produced without their involvement, which leads to a lack of commitment. Instances of communication and sharing between the region's countries with respect to initiatives to harmonize labour-market indicators are scarce, isolated and irregular.

2. Health component

One of the main problems encountered in the assessment concerns the marked differences between the different countries' institutional frameworks in the health sector. Two entities play a particularly important role in producing statistical information: national statistical institutes, which tend to focus on managing information from vital registries and demographic developments and providing important data on health determinants; and health ministries, which work chiefly with information related to epidemiology, infrastructure and human resources, as well as with the main morbidity indicators. The health ministries tend to produce more disaggregated information within the various units.

Levels of communication between countries are very limited and opportunities for sharing common experiences and achievements are only just emerging. These communication processes between different entities could take the form of networks organized around selected thematic areas based on the adoption of a unified frame of reference for statistical production by the different regions. Efforts must go beyond the production of isolated indicators, to generate sets or packages of indicators for the thematic areas selected using a common frame of reference. Also, the countries must agree on the units of aggregation for the indicators such as social determinants, equity and access, effective coverage, public health priorities and burden of disease.

One of the most critical problems identified in the production of statistical information is the lack of a common frame of reference for providing the information. In most cases, the processes of indicator production have been derived from different agencies, in a multifocal manner. There are important conceptual frameworks that must be reviewed, adopted and adapted, such as the frame of reference for the Health Metrics Network.

A number of multilateral entities, including the United Nations, the World Health Organization (WHO), the Organisation for Economic Co-operation and Development (OECD), the Food and Agriculture Organization of the United Nations (FAO) and others in the region, have taken steps to produce statistical information or obtain it from statistical institutes and health ministries. It has been found, however, that there is little shared understanding of the constraints on the production of health statistics, their components, the main areas of production and the development of standards. This limitation has narrowed the various countries' statistical approaches to the production of variables and indicators, with no regard for the connections and relationships between the different areas of health statistics. There are major differences in the degree to which the countries produce health statistics, and this is a gap that must be addressed in a targeted manner or through clusters. The use of a benchmarking strategy could yield good results.

In the health sector, at least two minimum data sets are already recognized by the various countries that have had experience over a length period of time. These two data sets correspond to the WHO Statistical Information System (WHOSIS) and the indicators arising from the Millennium Development Goals proposed by the United Nations. Obvious differences can be seen in the countries' capacities to adhere to standards and in the time periods for producing the selected statistical indicators.

Another very important factor identified during the assessment concerns the integration of the different indicators produced by the countries to be used in methodologies that would allow comparison in the construction of composite or complex indicators. In this regard, recommendations are needed to guide the countries in the production of the variables needed for assessing some of these indicators.

The project revealed significant gaps in the use of statistical sources for producing indicators. Most countries in the region have adopted different formats for producing health statistics. Moreover, technical staff have limited knowledge of the characteristics, merits and potential uses of the different formats for sourcing statistics, be it through censuses or surveys, or even registry systems.

Lastly, development and application of quality management systems for health statistics is often limited. National statistical institutes are still playing an incipient role and a quality-based approach could propel the harmonization processes.

3. Education component

One of the central problems identified by this study with respect to the harmonization of education statistics in the region is the difficulty of harmonizing data within each country given the many institutions involved in generating statistics. The management, generation and responsibility for statistical information are fragmented among each country's institutions.

In many countries, the level of communication among statistics-generating institutions is discernibly low. In others, communication is informal only. And in a small number, only a few channels of communication have been established. It is essential to break through this isolation within the countries if progress is to be made in regional harmonization.

The assessment has yielded a broad stock of information and details on the gaps in standards between countries. That will require work within each country, among the countries and among existing subregional groups and international agencies that have played a key role in the generation of education statistics.

A highly encouraging discovery made during the assessment was that most countries follow the guidelines of the United Nations Educational, Scientific, and Cultural Organization (UNESCO) and the International Standard Classification of Education (ISCED, 1997), although they also use standards issued by the United Nations, the Statistical Office of the European Communities (EUROSTAT) and OECD. Despite the practice of combining standards from multiple international agencies, the leadership of UNESCO and its work in the countries through the education ministries since 1978 have evidently been invaluable. However, the lack of engagement with the national statistical institutes has created noticeable gaps. Even in this common context, multiple interpretations of concepts and definitions were found within and between countries.

The harmonization of education statistics in the region requires a decision by all of the countries to produce a minimum group of common indicators. The assessment indicates that every country is calculating between 5 and 10 of a list of 33 enumerated indicators. UNESCO recommends a list of 31 indicators and the United Nations identifies six indicators in the Millennium Development Goals.

In many countries, indicators are not produced on a systematic or regular basis, but rather in response to requests from specialized agencies. Ideally, the production of indicators should address thematic areas based on a common conceptual framework, and the results should be made available to internal users within each country as well as to the other countries in the region.

II. FRAME OF REFERENCE FOR HARMONIZATION

A. HARMONIZATION IN THE FRAMEWORK OF SOCIAL STATISTICS

The proposal presented below is consistent with the following view and understanding of the harmonization process.

In the area of statistical production, harmonization is understood to be a multidimensional and relational process. In terms of comparability and quality, it is rooted in the assumed need to adopt, in the statistical production process, a body of standards typically formulated by specialized international

agencies in response to the inadequacy of methods designed by one or several countries in the context of the region's socio-economic and cultural integration. Generally, harmonization based on a common conceptual and methodological framework involves the following levels and dimensions:

- Theoretical-conceptual: frames of reference and integration, concepts, definitions, classifications and nomenclatures; and
- Methodological and procedural: sources, methodologies, technical standards, data collection methods, coverages, reference periods, levels of disaggregation, manuals; data content, definition, comparison, and interpretation, metadata and meta-information.

Moreover, harmonization concerns the degree to which national practices comply and are consistent with a body of concepts, definitions and standards, classifications and nomenclatures that are developed by a supranational agency with formal participation by the member countries. This, in turn, assumes the presence of an authority and a high degree of support from these countries. As well as the body of theory, some approaches to harmonization also cover standards on the procedures for collecting, processing, purging, aggregating and publishing data.

In the case of the region, the harmonization process should also include a rereading, analysis and adjustment of international standards to the national contexts, in order to determine the best way of generating national information to facilitate international comparisons while meeting the needs of the countries. Also part of the harmonization process is the generation of standards that are not provided by international agencies, or when existing standards do not serve the needs of the countries or the purposes of international comparison. Along these lines, harmonization refers not only to a body of standards produced by international agencies but also to best practices in the production of social statistics.

Furthermore, harmonization is conceived as a basic tool for achieving statistical quality, primarily with regard to spatio-temporal data comparison. In this process, comparability is associated with other data-quality aspects, such as accuracy, consistency and relevance.

In practical terms, harmonization is understood as the elimination (or reduction to minimal levels) of the differences, fragmentations, discrepancies and distances seen in national practices with respect to the interpretation and application of the conceptual and methodological elements expressed in the relevant international standards.

Harmonization encompasses the notion of integrating social statistics, which requires the existence or creation of a conceptual and operational frame of reference. This framework should enable the integration of social statistics and, in so doing, help close the gaps identified in the countries' statistical production processes and make national practices more consistent with the standards and procedures that have been mutually agreed upon. In addition, it should ensure the necessary level of consistency by linking up the various dimensions and the different information sectors and needs.

Lastly, harmonization includes the specification of a minimum common set of areas and indicators, the establishment of stages and the definition of deadlines for national and regional implementation.

B. STRATEGIC CONTEXT FOR THE CONTINUATION OF THE HARMONIZATION PROCESS

- The process should build on what already exists. Under the INAES project, an assessment was conducted that describes the current situation and gaps. This assessment serves as the baseline for the harmonization process.
- Statistical processes must be identified, conceptualized and generated in areas where they do not exist —such as cross-sectoral components (work-education, health-education)— and new regional objectives should be integrated and harmonized in view of the use of sector statistics.
- Technical consensus must be built on mechanisms that mark out a methodological roadmap towards harmonization. This should include *ex ante* strategies, whereby harmonization is pursued based on new statistical definitions and processes that are adopted by the countries, and interim strategies, where the objective is to close gaps using existing definitions and statistical processes.
- It is necessary to consolidate an authority with the legitimacy to lead the regional statistical harmonization process.
- Basic regulatory and legal procedures that support consensus should be agreed on.
- Regional cooperation is essential, and the countries should assume an active, participatory role.
- It is essential to ensure horizontal communication among the countries' statistical leaders and technical staff, within multiple levels and disciplines.

III. OBJECTIVES

A. OVERALL OBJECTIVE

To advance in the harmonization and comparability of social statistics in the region based on the information generated in the sector assessments and frames of reference developed under the INAES project.

This process should be framed by the quality requirements raised by the United Nations in the area of statistical production, the improvement and maintenance of national statistical capacity for the reliable and timely production of data, the information needs for measuring country progress in the regional and international context, the follow-up to progress towards the development objectives and commitments established in the regional and international agendas and the needs for harmonized information for formulating social policies in the countries and the region.

B. SPECIFIC OBJECTIVES

To develop new harmonization practices in the region based on the active participation and initiatives of the countries together with international technical cooperation and assistance. Harmonization should be pursued from the countries, drawing closely on the experiences and achievements of specialized agencies:

- Generate a common conceptual and methodological framework for the harmonization process to enable the integration of the region's social statistics.
- Identify and implement institutional mechanisms for regional leadership that can facilitate ongoing harmonization processes.
- Establish effective levels of coordination between the countries.
- Ground harmonization in the active participation of the countries through technical, financial, horizontal and vertical cooperation.
- Develop a common methodology for implementing harmonization processes.
- Incorporate the harmonization process into the regular activities of the national statistical institutes and establish it as a permanent, ongoing process.

IV. PROPOSAL

A. GENERAL DESCRIPTION

Taking into account the markedly broad and general nature of existing international standards for the harmonized production of social statistics in the region, which leave considerable room for interpretation of conceptual frameworks and obscure differences in values, standards and institutions; in view of the modernization of the countries' statistical production apparatuses and the establishment and integration of national statistical systems that seek to ensure the different elements of quality, principally with regard to comparability and relevance; and considering the countries' different ways and paces of adjusting to the conceptual frameworks and international standards, as well as the wide variety of socio-economic, institutional and administrative practices and structures in the region; the proposal calls for the harmonization of social statistics in the region to focus on the task of regionalizing the international standards currently in force, expanding or extending them or creating new standards to fill existing gaps (rereading the existing standards in view of current situations) and address current national conditions and situations. In this connection, the proposal also calls for harmonization efforts in the countries to be intensified and coordinated, in close collaboration and coordination with sector institutions, such as ministries, private entities and national statistical institutes, taking into account the need to understand this process in the framework of the national statistical systems and their components: health, education and social protection.

B. COMPONENTS

1. Development of a common framework

The harmonization process requires an integrated, reasonable common framework. It should be a conceptual, methodological and procedural and standards-based framework that helps reduce the discrepancies, differences and distances identified in the assessments of the different domains and types of social-sector data production in the region's countries and facilitates the integration of indicators and data into a coherent system that meets the various information needs. This framework will explicitly encompass the national and sector accounts, the body of objectives already agreed upon (Millennium Development Goals, education for all, decent work, and so forth) and the new goals that address, *inter alia*, the need to promote regional integration, wellbeing, greater equality and social cohesion.

2. Regional leadership for harmonization

The Statistical Conference of the Americas of ECLAC should assume a leading role in the harmonization of statistics at the regional level. This entails formalizing the Conference's role with regard to harmonization, as well as identifying the most effective mechanisms and forums.

3. Institutional coordination

Existing regional harmonization efforts need to be coordinated and integrated, taking into account the entities and institutions involved in this process (public and private, national, regional and international) and the various dimensions (technical, methodological, conceptual). Governments and specialized national institutions, as well as private institutions and entities, should play a central role in this task, with the specialized regional institutions, entities and agencies playing a secondary role. Experience thus far suggests that no single country, group of countries, organization or group of organizations acting alone is likely to achieve significant short-term success with harmonization. The harmonization efforts of governments, institutions, agencies, projects and other entities must be coordinated and integrated.

Within its organizational structure, each statistical institute will redouble the harmonization efforts it is already making and those it has planned through a permanent body that will integrate and coordinate, on an ongoing basis, the national, regional and international harmonization and standardization efforts agreed on as part of the continuation of the regional harmonization programmes.

This includes strengthening technical and political capacity at the national level through consensus-building strategies and forums. The process of national harmonization should be integrated with the role and the processes that statistical institutes are assuming in quality assurance of national and sector statistics. This is an effective tool for standardization at the level of each sector, based on definitions and statistical processes recommended by the regional authority.

4. Cooperation

National and international harmonization processes are only possible with the support of international cooperation and technical assistance. This paves the way for attaining the goals of high quality and comparability within and between the different statistical systems. Cooperation should be expanded and made more flexible, and broad, open forums are needed to move beyond the formal harmonization processes currently in place and overcome the existing rigidities.

Cooperation should recognize the differences in the statistical development levels of the different countries and generate common lessons based on individual experiences. Forms of multilateral and horizontal cooperation and technical and financial cooperation should be combined.

It is necessary to set up formal and informal forums and regular official meetings and informal channels for connection and participation. A system (national and regional networks) should be created for the countries to participate, communicate and exchange experiences in order to explain their practices, share and publicize experiences and projects in execution, hold consultations, swap information and monitor and follow up on the tasks associated with the harmonization of social statistics in the region. This should take place under the leadership, coordination and direction of a regional entity of recognized standing with binding authority that addresses sector and specific themes.

The proposal is to repurpose the forum created for the INAES project and make it into a regional public Internet site for sharing experiences and the work of national committees and international teams. This space would be used to share documents and information and would need to be coordinated to ensure that it benefited users and dealt with specific aspects.

The information obtained through the assessment is a regional public good. The quantitative assessment tables serve as a basic tool for identifying information sources for any comparative research or case study of the countries.

In coordination with the specialized agencies that have made headway on this topic, the most predictive indicators must be reviewed by sector and a common minimum harmonization framework must be mutually approved based on the results and successes of the harmonization experiences, including the assessments and common gaps.

Working groups need to be created to integrate the harmonization process with the tasks and activities currently being pursued by the countries. The recommendation is to create a central coordination group, an institution-building group, a technical support group and various sector groups. An interdisciplinary approach is sought based on a crosscutting strategy that supersedes technical and sector boundaries.

5. Common methodology

A common methodology is needed to guide the harmonization process, taking into account the unequal development of social statistics across different sectors, the need to frame the scope of the harmonization process with reference to the possibilities, needs and limitations of the countries and the basic requirements for obtaining quality information. The proposal is to identify the forms, levels and strategies of harmonization to consider in order to continue the process already begun.

The harmonization of concepts, definitions, classifications and nomenclatures for the purposes of national, regional and international comparison is a first step, but is not enough in itself. It is also necessary to harmonize sources and methods for collecting, processing, purging and aggregating data, as well as interpreting and analysing it, aiming for the spatial and temporal comparability of data between countries, groups of countries and regions, as well as the accuracy, consistency, significance and, above all, relevance of data in the national context.

In addition, it would be useful to identify harmonization strategies and their combinations. The harmonization of inputs (common standards, guidelines, methodologies and instruments) and outputs (comparison of results) may be employed depending on the timing and scope of the process, as may a results-based strategy combination. This also applies to harmonization of the inputs required for producing comparable data. Parallel harmonization strategies may be employed simultaneously, both in new social situations and in relation to indicators not currently measured and in the implementation of minimum sets of indicators.

6. Key components

The specific key components of the methodology are as follows:

(a) Standardization

Many of the region's countries have updated their methodologies, procedures, instruments and methods of data collection based on the adoption of the new information technologies and methods for sampling and collecting information and ensuring quality, which means standardization must be added to the harmonization process. This will pave the way for possible changes that can help ensure the continuation of statistical series.

(b) Best practices

The harmonization process, understood broadly as a step towards achieving quality of information in social statistics, should include the dissemination of best practices identified in the region: the widespread use of administrative, statistical, and oversight records; conceptual and instrumental integration of social sector statistics, survey tools and schedules; transition from cross-sectional surveys to continuous surveys; expansion of coverage and disaggregation with low costs and enhanced timeliness; introduction of quality assurance mechanisms, methods and processes; implementation of paperless data collection; and intensive use of information and communications technologies (ICT) that facilitate and lower the cost of collecting, compiling, purging, managing, analysing and disseminating information.

(c) Metadata

The harmonization process should include the production of standard methodologies and mechanisms for creating metadata across all domains, which will facilitate the technical and procedural tasks of harmonization, standardization and comparison, and the development of a clear, transparent process that offers reliability and credibility. Special priority should be given to specifying and documenting algorithms for calculating indicators, indices and other measures. The absence of quality standards for documentation and the lack of documented reports on the implementation, adaptation, changes and adjustments in data production methodologies in the region's countries underscores the need for methodologies for creating metadata as a mechanism for facilitating harmonization and comparability.

(d) Common language

A hugely important (albeit lower-profile) task that should be pursued immediately is the harmonization, contextualization and analysis of the language (vocabulary and terminology) used in the statistical measurement of social phenomena in the region. These basic forms of harmonization should be rolled into the continuation of the process already underway.

(e) Education, training and documentation

Personnel turnover and a near-universal lack of documentation on the adoption of standards and guidelines for statistical production in the region make it necessary to develop a modern, permanent regional training process that includes face-to-face and virtual modules and covers topics related to harmonization, standards and their implications, applications and limitations, among others. The same goes for the documentation of metadata production. The harmonization process should provide for enhanced national technical capacity for monitoring and overseeing the steps and developments of harmonization and transition.

(f) Technical support

Institutional leadership should be backed by a regional specialized technical support entity that has the capacity to develop the proposed methodology and assist the groups in each country with implementation. This entity will also monitor progress in each country and at the regional level, as well as report to the Statistical Conference of the Americas of ECLAC on institutional and political constraints and provide the information on which the Conference will base its decisions. The task of documenting all the methodological components will also fall to this technical group. The proposal is to create a strategic partnership comprising at least three national statistical offices, one from each subregion: Central America and Mexico, the Andean region and MERCOSUR. A careful assessment should be conducted of the technical capacity and experience with specific harmonization processes offered by candidate offices.