



OECD SHORT-TERM ECONOMIC STATISTICS EXPERT GROUP (STESSEG)

Item 7: Data and Metadata Presentation and Reporting Handbook: Summary of National Feedback

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Starting at 9:30 a.m. on the first day

DATA AND METADATA PRESENTATION AND REPORTING HANDBOOK

SUMMARY OF NATIONAL FEEDBACK

1. AUSTRALIA

Refer detailed comments provided earlier by the Australian Bureau of Statistics (ABS)

2. AUSTRIA

In order to get comparable data it is strongly emphasized to harmonise with ESTAT recommendations, which are an output of the ESTAT Working Parties of Short- Term- Statistics. The proposals for harmonised data presentations are a valuable input for all data users.

Relating to a working day adjustment procedure Statistics Austria prefers the term "working day adjusted" instead of "calendar adjusted". It specifies more exactly the type of adjustment.

As the importance of metadata is continuously growing, corresponding manuals are highly welcomed.

AD Recommendation 5

Due to ESTAT recommendations (e.g. Press releases - Industrial Production) rewording of Recommendation 5 is not welcomed to Statistik Austria.

As mentioned in the existing recommendations 4 and 5 - For month-on-previous-month and quarter-on-previous-quarter rates of change, seasonally adjusted data is the best way of presenting information about a time series and for rate of change with respect to the same period of previous year the year-on-year changes should be applied to raw data and to data adjusted for calendar effects if the latter are available

3. CZECH REPUBLIC

Data presentation and seasonal adjustment

All results are seasonally adjusted using the TRAMO-SEATS procedure. Both seasonally adjusted and raw series are published monthly or quarterly where available. Working days adjustment method is used where feasible too. The policy of the CZSO is to use an unique method of the seasonal adjustment for all processes, unless it is not in accordance with general recommendations and experiences (for labour market surveys the X-12-ARIMA method has been used). The TRAMO-SEATS method has been proved as flexible enough and is also broadly recommended in the CZSO.

The CZSO is trying to work out the general recommendations for the seasonal adjustment which consist of rules for the adjustment, such as the length of time series, number of regressors, using of direct and indirect method results, etc.

4. DENMARK

No additional comments on Handbook provided.

5. FINLAND

The Handbook is seen very useful in developing a more consistent publication policy for the short term indicators. Especially the glossary of terms and the summary are seen very widely applicable.

I. The scope of issues in the Handbook

The scope of issues currently included in the draft Handbook is considered very comprehensive in Statistics Finland. Any relevant data and metadata presentation and reporting issues which were not covered weren't found.

II. any relevant sources / references at the national or international levels that are not currently used?

There is no general revision policy in Statistics Finland that would guide publication of all the statistics or even the PEEI's, but there are individual revision policies for different statistics. This can't be referred to as a best practise. Regardless there is two established practices of revision policy in Statistics Finland: A. Some of the PEEI's are not revised at all and B. If statistics are revised then the revised data are published at the same time as the latest period is published for the first time.

Generally we calculate and publish the series only once per reference period (except for the flash estimates of GDP and sales of retail trade, which are published before the actual publication of GDP and sales of retail trade). Although some new information may be gained or some errors found on the previous periods, special error correction publications are not made or are very seldom made before the publication of the next reference period.

There is however a new policy of maintaining previous publications including the earlier published time series in the internet service of Statistics Finland in order to have an explicit revision follow-up for the users of statistics.

The general reasons for revisions (for example, accumulation of administrative data, error corrections and late responses) between the preliminary and the final data are explained in more stable documents such as quality or method manuals.

III. any specific problems / issues with regard to the wording of the current draft of the Handbook.

With regards to the recommendation 5, Finland frequently publishes raw data year-on-year (YoY) changes in press releases. In some press releases seasonally adjusted changes from previous period are also published. However, YoY change of seasonally adjusted estimates is seldom used.

6. HUNGARY

No additional comments on Handbook provided.

7. IRELAND

No additional comments on Handbook provided.

8. GERMANY – FSO

We are in line with the most recent form of the Handbook. Re: Question III: We favour the (existing) wording of Recommendation 5 and we do not agree to the suggested reformulation. For clarification and/or better understanding, it could be envisaged to add a box with an explanation/example of a "base effect".

9. GREECE

The draft version of data and metadata reporting and presentation handbook covers successfully a great variety of topics and explains in a simple and analytical way many notions. It is a useful tool for every NSO. We agree with the main purposes of this handbook as it must be underlined the great importance of consistency in practices that are used all over the world in order to obtain comparability. In addition, our attention should be not only the maintenance of high quality standards of producing statistical data, but also a common form of disseminating these data in a way that accessibility of information and clarity of concepts is achieved appropriately.

The NSSG moves to the same direction with the guidelines of this handbook and follows the great majority of the recommendations. Our attention is to use common practices of presentation and common terminologies within the national agency. Moreover, we keep the methodological information up-to-dated following the standards of Eurostat (STS Sources). As refers to the presentation of metadata our policy is to satisfy the needs, not only of the general public, but also to those that are familiar with the statistical notions, providing metadata to the users. The presented information is accompanied with the appropriate methodological information (achieving the second layer of the pyramid described in the handbook) while we inform public that more detailed information about the data and metadata which are available upon request (of course following the legislation of the protection of personal data, that means respecting confidentiality of data). Our continuous effort is to enhance the data provided on the website and a lot of progress has been made during the last years, especially on data that are presented in English, in order to satisfy the needs of international users.

We also agree that it is very important to provide information free of charge as the main purpose of the NSOs is the provision of information and not the profit.

For recommendation 5, we agree with the way which is presented at the handbook. The use of raw data, with the appropriate adjustment of calendar effects if it is needed, is sufficient to describe the year-on-year rate of change. A more detailed information could be derived from the alternative rewording which is based on the estimation of the two components (trend and seasonal), but there is the danger of confusing the general public which is more familiar with the simpler notion of year-on-year change of original data.

10. ITALY – BANK

I do not have comments on this Handbook, which at this advanced stage seems to me rather comprehensive and ready to be released officially.

11. ITALY – ISTAT

Istat fully agrees with the general structure and the contents of the “Draft Data and Metadata Reporting and Presentation Manual”.

As for the specific point of the calculation of YoY changes on different form of data (Recommendation 5 in Section 4.6.2), we agree with the current wording of the recommendation. As the alternative proposal (recommending y-o-y changes on trend-cycle and on seasonal adjusted data) is completely at odds with the conclusions of the STESEG task force on data presentation, the matter deserves to be discussed again in the next STESEG meeting.

12. KOREA

No additional comments on the Handbook provided.

13. LUXEMBOURG

The handbook on data and metadata reporting and presentation is already, in its current draft version, a very useful and important instrument for the NSOs. Luxembourg welcomes the planned hardcopy publication in French and English as well as a web version that can be gradually updated with new documents. In the printed version, it will be of use to add a bibliography with web links to available papers. Concerning recommendation 5 in section 4.6.2., Luxembourg backs the current version of this recommendation on the YoY changes applied to raw data and data adjusted to calendar effects. If the calendar related effect (ex. Easter) is important, we propose to add, for clarification, a comment or footnote.

14. MEXICO

Introduction

Due to the growing economic interdependence of countries as evidenced by the increasing volume and variety of global transactions, users have increased their demand to ensure the coherence and comparability of statistics across countries. Also, the need for the formulation of International guidelines and recommendations for the presentation of metadata on the internet has been recognized for some time. More and more, the internet has become the key tool for the dissemination of metadata authored by both national statistical agencies and international Organizations.

The OECD, in order to further the comparability of statistical results, noticed the increasing need of agreements between international organizations and national statistics agencies for the creation of a common data set for all the countries. The main identified causes for the differences in statistics are:

- Use of dissimilar definitions for variables
- Differences in the data collection and processing

Even if the differences derived from these factors are bare minimum, the data disseminated by the countries can seem different due to the use of unlike data presentation and reporting practices.

Regarding this issue, INEGI, recognizes the effort made by several international organizations such as the OECD to develop a series of recommendations to enhance comparability between different countries statistics. In a previous document INEGI analyzed the draft version of the manual submitted by the OECD called "*Draft Metadata and Reporting Manual*".

The version of the document that at that time was reviewed by INEGI included a very wide range of recommendations to standardize the data reporting and presentation practices. In our view, such recommendations widely cover all the necessary aspects to homogenize the presentation of the economic statistics from the countries that adopt these standards.

In the particular case of INEGI, most of these recommendations are already included in the presentation and reporting practices, as well as in the dissemination of the data.

The reason there still are some recommendations from the manual that haven't been applied to the processes of INEGI is because, at different levels, they present some difficulties for their application due to the nature of the statistics. However, the purpose of the Institute is to generate statistics that improve the quality of the stock of international information and allow the specialized users to realize deeper and more

efficient analysis to determine the international trend of the policies to be designed in order to address the problems the economy is facing.

Comments

Now that a more recent version of the document is available, it was also reviewed by INEGI. The new version is a more complete and clear set of recommendations that includes the same recommendations as the older version as well as new projects that will certainly improve the reporting and presentation practices in order to achieve full international comparability between statistics (such as the SDMX initiative proposed by the UN, in which INEGI is already conducting the necessary actions to participate). **The new standards developed by SDMX seek to take advantage of new web-based technologies and the expertise of those working on the business requirements and ITC support for the collection, compilation, and dissemination of statistical information.**

The Statistical Data and Metadata Exchange (SDMX) international project is a consortium of seven international organizations (BIS, ECB, Eurostat, IMF, OECD, UNSD, World Bank) working to foster standards for the exchange and sharing of data and metadata. The aim of the project at INEGI is to explore common e-standards and ongoing standardisation activities that could allow us to gain efficiency and avoid duplication of effort in their own work and possibly the work of others in the field of statistical information. This would be achieved by taking advantage of existing and emerging:

- Exchange protocols, such as GESMES/CB which was implemented by central banks for exchanging time series;
- Data dissemination formats, such as that implicit in the IMF's Dissemination Standards Bulletin Board (DSBB); and
- E-standards, such as eXtensible Markup Language (XML).

Moreover, in our view, some observations must be considered to ensure the scope and application of the recommendations made in the handbook.

- ✓ A more specific and clear glossary of statistical terms is needed, so the users of the statistical information can make comparison between countries or, in case the statistics does not represent the same indicator in different countries, they can select the proper variable to make their analysis.
- ✓ On page 10, in the second paragraph of the section ***Recommendations for the presentation and dissemination of metadata*** the second line says: “ *...previous work of the a number of international initiatives....*” In our view it should say “*.....previous work of the number of international initiatives...*”
- ✓ We agree that the electronic media has achieved a great importance in the dissemination of statistics and metadata. At the present time INEGI disseminates some of the data it generates via CDROM, on-line database, and internet and this can cause differences in the reporting and presentation of the data and these differences must be reflected in the recommendations. Also we agree that his handbook must be updated as new techniques of reporting and presenting metadata arise.

Where appropriate, **recommended definitions and terms are provided in some Sections to ensure a common understanding of the concepts and issues described.** Issues of terminology are particularly important in the discussion of growth rates and in guidelines for the reporting of different forms of data.

Interpretability reflects the ease with which the user may understand and properly use and analyse the data. The adequacy of concept definitions, target populations, variables and terminology that underlies the data, and information describing the possible limitations of the data, largely determines the degree of interpretability. Interpretability is assisted through the presentation of metadata which is appropriate to the needs of a range of different users and uses of the data and which is both well structured (readable) and readily accessible.

Data sharing implies a fundamental change in data dissemination with respect to co-ordination between international organisations and the role of national agencies in disseminating data to international organisations **through their implementation of data and metadata reporting guidelines that are designed not only to improve the interpretability and coherence of data but also to facilitate dissemination of data, and ultimately minimize their reporting burden.**

We must not forget that the data reporting standards described in the handbook is a key element of the implementation of this model, the aims of which are to:

- Avoid duplication and enhance efficiency in the transfer of data between systems while at the same time reducing the reporting burden of national agencies; and
- Ensure the consistency of data disseminated by different international organisations.

15. NETHERLANDS

General comment

We welcome this piece of work and see it as an important step forward for improving the possibilities for international comparison and proper interpretation of statistical data and publications.

Comment chapter 3

In the table on p. 33-36 recommendations for presenting growth-rates are given. However, no recommendations for the text for presenting growth-rates in press releases are given. Statistics Netherlands, for uniformity, internally uses the following recommendations for communication of growth rates in press releases:

- In press release texts, (preferably) use the twin concept ‘higher/lower’ when talking about year-on-year (YoY) growth rates.
- In press release texts, (preferably) use the twin concept ‘increase/decrease’ when talking about Month-on-previous-Month growth rates or Quarter-on-previous-Quarter growth rates.

This ensures uniformity and clarity of press releases, and could be interesting for this handbook as well. For more information about these ideas behind this recommendation, Statistics Netherlands can be contacted.

Comment chapter 4

Statistics Netherlands considers the original recommendation 5 in section 4.6, pp 51 much better than the proposed recommendation in the Overview, pp. 4:

“For rate of change with respect to the same period of the previous year the year-on-year (YoY) changes should be applied to trend estimates and to seasonally adjusted estimates. Where necessary, special effects contained in the base period should be highlighted when presenting YoY changes (base effect).”

According to Statistics Netherlands, YoY-changes should not be calculated using seasonally adjusted (SA) data. This can give problems in communicating the results in press releases (for example Eurostat and the quarterly GDP). [Maybe it is necessary to distinct between “press releases” and “analytical reports”. The first should contain too many different ways to present results, to avoid confusing the public. In the second more different comparisons, maybe also YoY-growth based on SA data could be made.]

Comments chapter 5

The paper:

Algera, Symon, *Statistical Benchmarking – The Dutch case*. Paper presented at the OECD/Eurostat workshop, April 2005, Head macro-economic short-term statistics, Statistics Netherlands, March 2005.

presented at the Eurostat/OECD workshop on Benchmarking of April 2005 contains many Statistics Netherlands opinions about revision policy and dissemination of metadata. In this paper, reference to relevant parts is made where appropriate. According to Statistics Netherlands, it would be a good idea to put a reference to this Paper in the reference section of the Data and metadata reporting and presentation handbook.

Some points could be clarified further in the manual.

- Add as metadata for each variable in which revision policy applies to this variable.
- Add as metadata for each variable in which phase of revision this variable is. Is it a preliminary figure? Has it been adjusted to, for example, Quarterly National Accounts (QNA)?

A Statistics Netherlands view on these subjects is given on pages 7-8 of **Algera, 2005**.

Comments chapter 6

- An, in the opinion of Statistics Netherlands, nice and effective way to illustrate the various aspects of revisions (revisions sometimes can be considered a form of Benchmarking), is the so-called ‘Statistical Matrix’. This idea has been elaborated in **See Algera, 2005, p. 2-3**.
- In this chapter 6, also a comment on saving and keeping earlier versions of the data in web-based databases, such as the StatLine database of Statistics Netherlands, could be made. This idea has been elaborated in **Algera, 2005, p. 9-10**.

16. NEW ZEALAND

Paper 1 – Brief overview of development of the data and metadata reporting and presentation handbook and outstanding issues for comment

- Scope of issues currently included in the draft handbook: It is unclear why a discussion on graphical presentation is outside the scope of the handbook. The use of graphs to represent time series data is important. Understanding when to use, or not to use particular types of graphs is important and should be discussed.
- Relevant sources/references not currently used: not applicable.
- Specific problems/issues with regard to wording of the current draft of the handbook:
 - 4.6.2 Recommendation 3. In press releases Statistics New Zealand prefers to lead with movements in seasonally adjusted estimates rather than change expressed in levels. This is because the change in level can be misleading if not in context. If space permits levels are also included. The recommendation could be reworded “Press releases presenting seasonally adjusted flow series should at the minimum provide period-to-period growth rates for the latest period **and it space permits period-to-period change in levels**”.

Paper 2 – Data and metadata reporting and presentation handbook

17. NORWAY

Excellent work. No further comments

18. POLAND

No additional comments on Handbook provided.

19. SLOVAK REPUBLIC

1. We appreciate very much the presented Handbook. In our view it is really important to concentrate all necessary recommendations concerning metadata reporting in one complex document. We consider Part 3. and 4. concerning guidelines for the reporting of different types and forms of data to be very important. Surely, there is much of precious information in Eurostat “Methodology of short-term business statistics” and “Handbook on the design and implementation of business surveys” as well. However, the point of view in OECD Handbook is really comprehensive with regard to the general overview dealing not only with specific variables and processes.

Concerning the scope of issues it would be useful, according to our opinion, to add the special part dealing with confidentiality issues presentation. There are different ways of confidentiality treatment and of confidentiality marking in particular NSO. The recommendations in this field could help to ensure better understanding of users.

2. In enclosure you will find example of our national online public database SLOVSTAT with regard to the metadata presentation. This is quite new tool being operational starting 1st May 2005. You will find the content of the database with the examples of possible metadata information (Annex1).

In general, every statistical publication contains methodological notes concerning particular statistics describing data sources, definitions of variables, classifications used for variable breakdown, methods of indicator compilation, forms and types of indices etc. The special document containing detailed methodological descriptions of all basic indicators Methodological letters is prepared and updated on permanent basis.

Data processing of the statistical surveys is managed by Integrated Automated Statistical Information System (ASIS) which is tailor made for the purposes of SO SR. This system includes at present 4 basic subsystems one of which is Metadata system (METIS). Meta information includes descriptions of variables (basic indicators, breakdown of basic indicators, indicator items), of classifications and questionnaires (modules, indicator items).

3. Concerning specific problems we would like to support new version of Recommendation 5.

20. SPAIN

The development of the *Data and Metadata Reporting and Presentation Handbook* constitutes an interesting item that will help NSI to harmonise their dissemination practices, in particular the data (and metadata) dissemination via the Internet.

During the last years, NSI have tried to upload all their statistical information on the Internet, “free of charge” as a general rule. Nevertheless statistical data are not enough to fulfil the commitment of NSI with end users, because they should have at their disposal “metadata” in an organized and standard form, in order to describe the methodological features of the information provided and to meet the requirements of statistical users. We can find an example with the data (and metadata) described on the International Monetary Fund's Dissemination Standards Bulletin Board (DSBB), statistical standards to which INE-Spain has committed (see <http://www.ine.es/tempus/fmi/fmi.html>).

In addition, the National Statistics Institute of Spain disseminates around 100 publications per year on different statistical subjects. In order to establish a set of edition rules not only for books but also for brochures, press release or Internet files, INE-Spain has just produced a “Manual on Edition of INE Publications”. This Manual supplements the so-called “Imagen del INE”, a specific “institutional graphic identity” focussed in the presentation of the statistical tables and its possible formats, which was implemented at the beginning of the 90s.

Finally, we particularly welcome the inclusion of *key terminology* relating to several chapters of the Handbook. There is no doubt it will enable producer and user to get a better understanding of the output of the statistical production.

21. SWITZERLAND

Generally the handbook meets our waitings and we consider it as an important reference. It contains a great number of clarifications and precisions concerning the best methods and documentation. This handbook presents the different ways accessible to the statistician and let the liberty to anyone for choosing and adapting the best methods within the framework of the international standards.

We can only confirm the validity of such a handbook.

There is one point that could be better explained. This is the difference between trend-cycle and cyclical component of a time series (page 43).

Practice in Switzerland, the case of statistics on employment

As far as statistics on employment are concerned (variable 210 according Eurostat), SFSO generally publishes :

- a) aggregated absolute values (raw data)
- b) rates of yearly evolution (according definition of page 38)
- c) seasonally adjusted time series (without working/trading day ajustement)

The metadata are presented in the form of methodological appendices accompanying the press releases, the publications, or the various Internet sites (SFSO, IMF, Eurostat).

Methodology is presented in publications "methodological Bases" that are updated after each revision. Sampling error is presented in form of relative values

The revisions are announced by the way of press releases according to the recommendations of the IMF and of Eurostat.

22. UNITED KINGDOM

The UK generally welcomes the development of this handbook, and believes that an appropriate balance in the level of detail and background information which it presents.

Some specific comments

I) the scope is appropriate and the UK can not identify any clear omissions

II) there are no obvious omissions of sources /references.

III) On Recommendations 1,2 3 and 4, 6, 7, 8, 9 and 10: The ONS fully endorses these recommendations. Our current practice is in line with these.

On Recommendations 5, i.e.

STESEG recommendation 5: For rates of change with respect to the same period of previous year the Year-on-Year changes should be applied to the raw data and to data adjusted for calendar effects if the latter are available. Where necessary, special effects contained in the base period should be highlighted when presenting YoY (base effects).

ONS publication focus mainly on seasonally adjusted data. Nearly all press releases contain only seasonally adjusted data although the non-seasonal adjusted series are available through the website or on request. In these circumstances it would be a radical departure from current practices to base year on year changes on the raw data. In addition, the ONS does not normally make available calendar adjusted data. Adjustment for calendar effects is viewed as being part of the seasonal adjustment process. All series that have passed through the seasonal adjustment process are labelled as seasonally adjusted even in cases where the series was found not to be seasonal or subject to calendar effects (in which case the SA series and the NSA series are the same) or subject only to seasonal effects (in which case the SA series and the calendar adjusted series are the same).

It is arguable whether the YoY change in the raw data provides a more accurate picture of what is happening in the economy than the YoY change in the SA data. Where a series has moving seasonality and

the two measures are thus likely to differ, the measure based on the SA data, where this effect has been removed, could be regarded as the better one.

In situations where different data sources have to be made coherent and consistent, for example in the compilation of national accounts, the balancing in the UK is carried out using seasonally adjusted data. Any balancing adjustments are fed back into the NSA wherever possible but some aggregate series, for instance GDP, only really exist in seasonally adjusted form. In these circumstances it is impractical and inaccurate to base YoY changes on the raw data.

On the basis of the above, we reject the Task Force Recommendation.

23. UNITED STATES – BLS

The *Overview* is a nice introduction to the *Handbook* and gives the reader an indication of the development of the *Handbook* and what the *Handbook* contains.

The *Handbook* has the potential to be a good guide for organizations such as the BLS in its work to provide statistical data and metadata to the public and other statistical organizations. However, there are many guidelines and recommendations. In fact, the *Handbook* covers so much ground that the following comments are not reflective of a complete review by all those with necessary expertise.

1) The *Handbook* requires a thorough review by relevant subject matter offices throughout the US statistical system. This cannot be stressed enough. This *Handbook* is quite detailed.

2) The recommendations in the *Handbook* need to be tested in practice before they are adopted by the international statistical community.

3) Sophisticated terminology management, harmonization, and (sometimes) standardization is called for in the *Handbook*, and the BLS and other US statistical agencies are not currently doing that kind of work. Our ability to follow these recommendations is not clear at this time.

4) The *Overview* and *Handbook* refer to metadata in support of data dissemination and exchange. The *Overview*, paragraph 6, asks national statistical offices to "prepare adequate metadata". These are necessary and laudable goals. However, the best way to get metadata for dissemination and exchange from statistical offices is if it is already available from its use within the office. In this sense, preparation is not the issue. If every survey and data harmonization project is documented and uses metadata throughout the life-cycle, then all necessary metadata will be available. The problem of obtaining metadata for dissemination and exchange will be greatly simplified.

5) In section 5.2, the need for statistical metadata content standards is stated. Many statistical offices are already using a metadata content standard, e.g., Statistics Canada. These standards are in place for each national office, but they do not correspond from country to country. An obvious way to gain harmony is to insist on one content standard for every office. However, this puts the cart before the horse. No one will agree on content until each office is managing content. The focus at this stage needs to be metadata management throughout each statistical office for every stage of the survey life-cycle. Then, the problem of metadata harmonization will be similar to the current problems in data harmonization. This will facilitate the necessary consensus to agree on content, concepts, and terminology.

6) In section 2.2.3, the Data Documentation Initiative (DDI) is listed as a standard. The word standard should be reserved for specifications developed by a recognized Standards Development Organization

(SDO). The DDI may achieve this status soon, but it does not have it now. Please refer to the DDI as *de facto* standard or a consensus across a community of practice (the statistical data archive community).

7) The IMF SDDS (Special Data Dissemination Standard) is mentioned as a standard for statistical agencies to follow. The only reason the SDDS is considered a standard is because IMF said so. The specification was developed by IMF. Standards are developed through a consensus process (See www.incits.org or www.iso.org). This was not.

24. UNITED STATES – BUREAU OF CENSUS / BUREAU OF ECONOMIC ANALYSIS

No additional comments on Handbook provided.

25. EUROSTAT

Very detailed comments provided on earlier version.

26. IMF

Detailed comments provided on earlier version.

27. WORLD BANK

Very detailed comments provided on earlier version

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