



ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT

OECD SHORT-TERM ECONOMIC STATISTICS EXPERT GROUP (STESSEG)

Overview of development of the Data and Metadata Reporting and Presentation
Handbook and outstanding issues

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Overview of development of the *Data and Metadata Reporting and Presentation Handbook* and outstanding issues

I. Background

1. A proposal for the development of a handbook containing guidelines and recommendations for the reporting and presentation of data and metadata was submitted by the OECD to the United Nations Statistical Commission (UNSC) for guidance in March 2004. The Commission took note of the work done by the OECD in the preparation of the proposal. A first draft of the Handbook was also discussed at last years' STESEG meeting. This incorporated extensive material and recommendations from the STESEG Data Presentation and Seasonal Adjustment Task Force that was wound up last year.

2. The areas from the task force incorporated into the Handbook comprised:

- presentation terminology;
- growth rate presentation of growth rates;
- presentation of information on seasonal adjustment;
- unambiguous presentation of similar but not identical series;
- rebasing indices.

It is also intended to incorporate material from the STESEG Administrative Data Task Force following discussion at this years' STESEG meeting.

3. Following the 2004 STESEG meeting the OECD prepared a second draft of the Handbook, drawing on comments and suggestions made by participants at the meeting. This version was also presented at the 4th meeting of the Committee for the Co-ordination of Statistical Activities (CCSA) in September. The CCSA expressed strong support for the development of such a Handbook which it believed would also constitute a useful reference source for developing countries. In this context it was suggested that feedback on draft versions from non-OECD countries should be actively sought as well as the inclusion of presentation practices in non-economic statistical areas. Committee members also noted the significance of the Handbook in the context of the work on SDMX (Statistical Data and Metadata Exchange) in particular and in making effective arrangements for sharing of data among international agencies in general. Very detailed input has also been received from Eurostat, IMF and the World Bank as well as from some NSOs and Central Banks. Comments from the World Bank included recommendations, etc, relevant to social and demographic statistics that have been incorporated into the current draft.

4. The third version of the Handbook was submitted to the UNSC for comment as a background document in March 2005.

II. Scope of reporting and presentation guidelines Handbook

5. The current draft *Data and Metadata Reporting and Presentation Handbook* draws a clear distinction between data presentation standards involving table layout, font, type faces, readability, graphical presentation, etc, used by both international organisations and national agencies and standards for the reporting of data by national agencies to international organisations. Although the Handbook touches

on issues of presentation it also outlines standards for data reporting. It provides a small number of specific recommendations covering the two broad dimensions in which all data may be reported, namely:

- Types of data – absolute figures, indices, growth rates, ratios.
- Form of data – raw (original or non-seasonally adjusted series), working day adjusted, seasonally adjusted, trend-cycle.

6. The Handbook also emphasises the need for national agencies and international organisations to prepare adequate metadata describing concepts, collection and processing practices as well as reporting and presentation practices. Such metadata must also be readily accessible and understood by users with different degrees of statistical expertise. Recommendations here will pick up on previous work (and work to be undertaken over the next 12 months) by METIS (Workshop on Statistical Metadata).

7. In addition, the draft version of the Handbook covers a small number of key data reporting practices that also have a significant impact on data interpretability and where different approaches currently used by national and international agencies complicate comparisons of national data. These include different:

- data revision presentation practices;
- reporting practices for the presentation of series breaks;
- and inconsistent practices for the linking of time series;
- practices for the reporting of sampling and non-sampling errors;
- base years in the presentation of indices;
- citation practices;
- and incomplete practices for the presentation of administrative data.

8. The Handbook outlines key recommendations and/or good practice with regard to each of these. Such practices are consistent with sound governance in statistics encompassed, either implicitly or explicitly, in the UN *Fundamental Principles of Official Statistics* and the UN *Handbook on the Operation and Organisation of a Statistical Agency*. The range of reporting practices outlined in the initial version of the Handbook could be expanded in subsequent web versions to include other emerging data and metadata reporting and presentation issues. Possible additional future topics include: co-ordination of release dates; aggregation and composition of geographical data; and more detailed guidelines for the dissemination of data and metadata. Finally, the introductory Sections of the Handbook provide context and linkages to current international initiatives on data and metadata exchange, in particular, those under the umbrella of SDMX.

9. The areas of the Handbook where consensus has been most difficult to achieve have concerned some of the time series and seasonal adjustment terminology and some of the recommendations regarding the use of growth rates. The result has been a broadening of some of the recommendations. Finally, it is still hoped that the final version will incorporate a brief chapter on recommendations on the linking of time series, which due to time constraints has not been included in the version of the Handbook dispatched to STESEG participants at the end of April 2005. This chapter may be despatched as a separate short note about two weeks prior to the June 2005 STESEG meeting.

IV. Future work and timelines

10. The OECD will incorporate relevant comments and suggestions into a final version of the Handbook for submission to the OECD Committee on Statistics for approval following the June 2005 STESEG meeting. Hardcopy (in French and English) and web versions of the Handbook will be published in the second half of 2005. Publication will coincide with a publicity campaign by the OECD to encourage implementation of the guidelines and recommendations included in the Handbook and for national and international organisations to provide appropriate references and links to it on their websites, etc.

11. One of the issues discussed with a number of agencies in the preparation of the Handbook concerns the appropriate balance in the level of detail and background information that should be included in the actual text of the Handbook. There is a wide range of literature on many of the topics covered in the Handbook at both the national and international levels and those used in the preparation of the Handbook to date are provided in the list of references at the back of the draft publication.

12. The authors of the Handbook have sought an appropriate balance between providing sufficient detail and specific guidance on reporting and presentation recommendations that would be of use to users hopefully without making the resulting publication too large. Extensive use has been made of links and references and publications and selected examples of good practice in “information boxes” which serve both to illustrate the recommendations and to break the text. The final version of the Handbook could well benefit from the inclusion of additional information boxes.

V. Issues where final STESEG comments are sought

13. Comments and guidance from STESEG are sought with regard to:

I. the scope of issues currently included in the draft Handbook. Are any relevant / key data and metadata presentation and reporting issues not currently covered that could be included in a subsequent website version of the Handbook following initial publication for:

- social and demographic statistics;
- developing countries;
- annual statistics;
- economic statistics;

II. any relevant sources / references at the national or international levels that are not currently used? These include relevant illustrations of good practice at the national level that could be included in additional information boxes;

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

For example, the only area where consensus is still required is with respect to Recommendation 5 (in Section 4.6.2 – Forms of data to be presented, Analytical transformations). Some countries feel that a raw data year-on-year (YoY) change can be affected by the calendar related effect, for example Easter, trading days, etc. If calendar effect adjusted estimates are used, YoY changes are more meaningful. These countries contend that seasonal adjusted estimates is a more general form of calendar effect adjustment, and that therefore, seasonal adjusted YoY is better than raw data YoY changes. However, YoY change of seasonally adjusted estimates would not give an accurate picture about underlying change over years because occasional events can still give a distorted picture. The countries therefore recommend that YoY change of trend estimate should give a more realistic picture of underlying changes.

Flowing on from this, a suggested rewording of the existing Recommendation 5 would be: “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).”