TOWARDS A TAXONOMY TO MEASURE THE PROGRESS OF SOCIETIES

A PROPOSAL BASED ON REFLECTIONS FROM MEXICO

Mariano Rojas

Foro Consultivo Científico y Tecnológico

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The Mexican Initiative

- In response to the call from the OECD’s Global Project on Measuring the Progress of Societies

- Foro Consultivo Científico y Tecnológico
  - A local initiative launched in July, 2008
  - Acts as correspondent to the global project
The Mexican Initiative

- **Objectives**
  - To foster reflection on two fundamental questions
    - What should society consider as progress in the XXI century?
    - How to measure it?
  - To promote dialogue
  - To propose a taxonomy: From concept to conception

- **Basic principle**
  - To provide an answer to these questions is a matter that corresponds to each society
The Mexican Initiative

- A Reflection about Progress
  - A mapping of relevant research done in Mexico
  - Identifying consolidated researchers
    - Long research trajectory in Mexico and the rest of Latin America
    - Come from many disciplines in social science
The Mexican Initiative

- Richness in diversity
  - Disciplines, ideas, approaches, methodologies, regions

- Richness of breadth
  - as it embraces many disciplines and approaches

- Richness of depth
  - Reflections substantiated by many years of study and investigation

- Relevance
  - Relevant for the inhabitants of Mexico and, perhaps, to the inhabitants of the majority of countries in the world
The Mexican Initiative

- From **the concept of progress** to
  - Conceptions
  - Measurement proposals
- Importance of **interdisciplinary research**
  - Progress is **about human beings** and their life in society
- Progress **must not be an alien concept to ordinary people**
  - Study of progress is not restricted to a single discipline
The Mexican Initiative

- No need to have a consensus
  - Diversity is valuable and constructive
  - Indicators need to take this into consideration

- A book
  - Compiles 28 reflections and some general chapters about progress
  - [www.midiendoelprogreso.org](http://www.midiendoelprogreso.org)
The Proposed Taxonomy

- Based on the reflections
  - But not intended to substitute any one of them

- Aims
  - Making a coherent and useful proposal for the process of dialog and definition of what we want to consider as progress and how we could measure it
The Proposed Taxonomy

- **A rationale** to assess and measure progress of societies
  - Seeks to create a coherent classification scheme with the aim of giving substance to a concept
  - A proposal about the areas that require monitoring to measure the progress of societies
    - Not making a specific proposal about the variables to be used
The Proposed Taxonomy

- Distinction
  - Assessment of progress
    - That which can be considered as progress
  - The identification and evaluation of explanatory factors and instruments for fostering progress
    - That which may promote progress, but which is not progress
The Proposed Taxonomy

- Assessment of Progress
  - Final aims
    - Intrinsic value to people
      - Deserve to be pursued for their own sake
      - Are not instruments to attain other aims
    - People centered
      - Relevant to ordinary people
      - People are not only generators of progress, they are beneficiaries and appraisers of progress
    - Progress should not alien to people
      - It should not be only an academic concept
The Proposed Taxonomy

- Assessment of progress
  - Intermediate aims
    - They contribute to the final aims
    - Have procedural value
      - It is worth asking what is the contribution of these intermediate aims to the final aims, but it is also worth mentioning that it is important to achieve these final aims in one way and not another
    - Are relevant to people, but have broad academic orientation
Ultimate aims
People-Centered

Intermediate Aims
Relevant to people, academic orientation

Arena of Public Policy and Personal Action
Policies, goals, actions

Arenas of assessment of progress
Understanding factors that lead to progress
The Proposed Taxonomy

- **Detailed taxonomy**
  - Review and interpretation of reflections
  - Placing reflections within the rationale
The Proposed Taxonomy

- **Subjective Well-Being**
  - Life satisfaction, satisfaction in domains of life
  - Affective states and cognitive-oriented appraisals

- **Fulfillment**
  - Self-realization
  - Accomplishing full display of human potential
The Proposed Taxonomy

- **Physical and Mental Health**
  - Absence of functionality problems
  - Stress, anguish and other emotional states

- **Effectiveness of Democracy, Rights**
  - Political rights
  - Civil and social coexistence
  - State of law, respect to citizenship rights
  - Social rights

- **Income and Wealth**
  - Income levels, as well as its use and generation
The Proposed Taxonomy

- **Human Relations**
  - Satisfactory interpersonal relations
    - Family
    - Friends
    - Community
    - Colleagues
  - Density and strength of the social tissue and the bonds of solidarity

- **Free time**
  - Availability and use of free time
The Proposed Taxonomy

- **Work and its Conditions**
  - Inter-personal relations at work
  - Salaries and fringe benefits
  - Dignity provided by work
  - Commuting

- **Identity and Culture**
  - Relations of cultural and ethnic affiliation
  - Sense of belonging to specific communities
  - Keeping track of community and identity-group level indicators
The Proposed Taxonomy

- **Habitability Conditions**
  - Surrounding favorable conditions
  - Safety, violence, recreational facilities, so on

- **Education**
  - Beyond mere human capital
  - Providing human beings with the abilities to have a happy life and for self-fulfillment
  - Offering capacities for coexistence and civic life, for mental enjoyment and for critical thinking
  - Generating social and psychological harmony
  - Teaching the appreciation of nature
The Proposed Taxonomy

- Shared Progress
  - Within nations: Distribution
    - Attention to inequalities in all areas of progress assessment
    - Similarly, measurements of exclusion are required in all areas
  - Across nations: Global Perspective
    - Global-level indicators
    - Recognize that we all live in an interconnected world and that we have a shared destiny
  - Along generations: Sustainability
    - Concern for future generations
The Proposed Taxonomy

- Methodological issues
  - Quantitative
    - Mostly
  - Qualitative
    - In depth studies, specific groups
The Proposed Taxonomy

- Reflections
  - From concept to conception

- Moving forward
  - Indicators
    - Statisticians’ involvement
  - Extending the dialogue beyond academic groups

www.midiendoelprogreso.org
Final Aims

Subjective Wellbeing

Human Fulfillment

Intermediate Aims

Physical and Mental Health

Income and Wealth

Human Relations

Habitability

Democracy and Rights

Free Time

Work and its Conditions

Identity and Culture

Education

Distribution

Sustainability

Globalization