



# GENERAL GUIDELINES OF NATIONAL STATISTICAL ACTIVITY

2008 - 2012



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2008 – 2012

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A blurred background image showing a crowd of people, likely at a public event or conference, with some individuals in the foreground and others receding into the distance.

## OVERVIEW

The General Guidelines of National Statistical Activity (Portuguese acronym: LGAEN) are the reference instrument for the strategic planning of the *Instituto Nacional de Estatística* (hereinafter referred to as Statistics Portugal) and of the entities intervening in national statistical production. They substantiate the national statistical priorities within the framework of the Community Statistical Programme and it is incumbent on the *Conselho Superior de Estatística* (hereinafter referred to as Statistical Council) to approve them.

The five-year period of validity of the LGAEN coincides with that of the Community Statistical Programme that defines the guidelines for the European Statistical System, taking into account the political priorities established by the Commission and underlining adherence to and compliance with the European Statistics Code of Practice.

This document is being prepared whilst a new Law governing the *Sistema Estatístico Nacional* (hereinafter referred to as

National Statistical System) is pending endorsement by the Portuguese Parliament and when a significant part of the entities intervening in the System is undergoing an organisational restructuring process. This Law, to be endorsed by the Parliament, will provide for the framework required for an effective coordination of the National Statistical System, namely with the creation of conditions to clarify the statute of the delegation of powers.

However, the coordination of the national statistical activity goes beyond the field of involvement of those entities that, given the nature of their tasks, should be delegated powers for the production of official statistics. There are other entities that, within the scope of their normal business, generate administrative data and manage databases whose utilisation for statistical purposes makes it possible to obviate redundancies in the collection of information with citizens and enterprises, as well as unnecessary costs for the State Budget.

Historical reasons, namely in the most recent past associated with the need to monitor economic and monetary policies at the European Union (EU) level, have stressed the role of the production of statistics in the economic area (currently around two thirds of the National Statistical System's resources are allocated to the production of economic statistics).

However, and notwithstanding the fact that there are still a few areas to be developed in the economic field, such as energy and services statistics, the current dynamics of societies, namely at the EU level, requires that special attention is paid to the production of official statistics targeted at decision-making in policies falling under the responsibility of Member States, inter alia in the social area (migration, population ageing, new family structures, social inclusion/exclusion, security, well-being, health, social protection...) and in the environment area.

The improvement in the quality of the statistics produced within the scope of the National Statistical System – namely as regards the adoption of methodologies referring to the best international practices, the increased comparability of statistics and compliance with the deadlines for the availability of information and the respective accessibility – assumes a particular importance in relation to the assessment made by the main users and the results achieved in the recent past in terms of the monitoring of activities.

The document contains the definition of the Strategic Objectives for the National Statistical System for 2008-2012, as well as the Action Lines that will guide its activity over this period. Some of the most relevant measures for the fulfilment of the objectives defined are also identified.



## VISION FOR THE NATIONAL STATISTICAL SYSTEM IN 2012

In 2012 the National Statistical System is an integrated, dynamic and efficient system carrying on its activities in compliance with high-quality statistical standards, cost-conscious as regards data providers and its objective of supplying a service to society.







## STRATEGIC OBJECTIVES

### Objective 1

To improve the quality of statistics produced within the scope of the National Statistical System, with special focus on compliance with deadlines for the availability and accessibility of data

### Objective 2

To optimise the functioning of the National Statistical System through the reinforcement of institutional coordination and cooperation mechanisms and the improvement of human resources skills

### Objective 3

To ensure statistical production in areas that are particularly relevant for understanding current societies, with special focus on their spatial breakdown



## STRATEGIC OBJECTIVES / ACTION LINES (LA)

### Objective 1

To improve the quality of statistics produced within the scope of the National Statistical System, with special focus on compliance with deadlines for the availability and accessibility of data

LA1 – To increase the receptivity and participation of institutions, enterprises and individuals in data collection operations conducted by entities of the National Statistical System

LA2 – To heighten the use of administrative data for statistical purposes, ensuring the intervention of the National Statistical System from its inception

LA3 – To overall reduce the costs with the production of statistical information

LA4 – To shorten the deadline of availability of information, in compliance with the commitments taken on, namely with international organisations

LA5 – To produce and make available long time series for the most relevant indicators

LA6 – To define and implement a data revision policy

LA7 – To align the statistical metadata system with best international practices

LA8 – To render the statistical metadata system appropriate to the needs of the interchange of metadata within the National Statistical System and the European Statistical System

LA9 – To define and implement a dissemination policy for official statistics

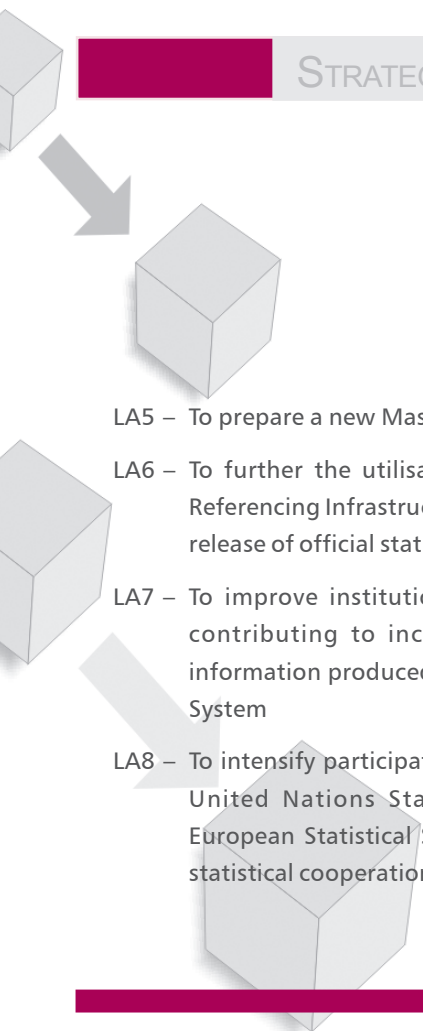
- LA10 – To anticipate user needs and develop products and services that are appropriate to different groups of users
- LA11 – To improve the quality of the supply of dissemination services
- LA12 – To increase proximity to the scientific community
- LA13 – To increment statistical literacy

## Objective 2

To optimise the functioning of the National Statistical System through the reinforcement of institutional coordination and cooperation mechanisms and the improvement of human resources skills

- LA1 – To promote cooperation among statistical authorities, within the framework of the new Law governing the National Statistical System
- LA2 – To promote an effective process for the delegation of powers, within the framework of the new Law governing the National Statistical System
- LA3 – To improve the effectiveness of the National Statistical System in the planning and conduct of statistical operations
- LA4 – To implement the Universe and Sample Management System and introduce new sampling methodologies and methods of statistical inference

## STRATEGIC OBJECTIVES / ACTION LINES (AL)



LA5 – To prepare a new Master Sample

LA6 – To further the utilisation of the Geographical Referencing Infrastructure in the production and release of official statistical information

LA7 – To improve institutional links with a view to contributing to increase the quality of the information produced in the National Statistical System

LA8 – To intensify participation in the activities of the United Nations Statistics Commission, the European Statistical System and in activities of statistical cooperation for development

LA9 – To promote recruitment, vocational training and the conditions for the permanence of staff who is adequate to the needs of the National Statistical System

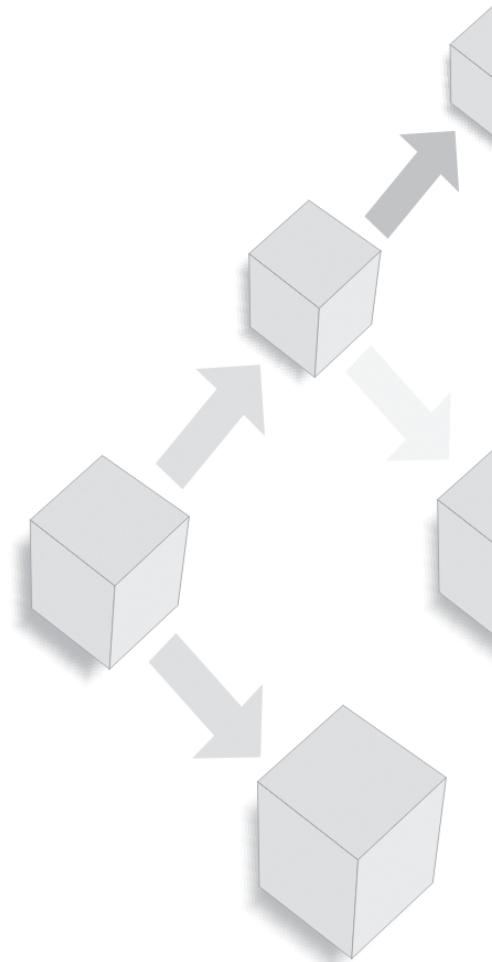
### Objective 3

To ensure statistical production in areas that are particularly relevant for understanding current societies, with special focus on their spatial breakdown

LA1 – To increase the efficiency of the use of National Statistical System´s resources, making it possible to reconcile the reinforcement of the production of non-economic statistics with the development of the production of economic statistics

LA2 – To ensure essential information in the relevant social and welfare areas

LA3 – To develop and consolidate the production of sectoral economic statistics and environmental statistics



# STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

## Objective 1

To improve the quality of statistics produced within the scope of the National Statistical System, with special focus on compliance with deadlines for the availability and accessibility of data

**LA1 – To increase the receptivity and participation of institutions, enterprises and individuals in data collection operations conducted by the entities of the National Statistical System**

### Measures

- Promotion of awareness actions on the relevance of statistics in society, with particular emphasis on the importance of the timely provision of information.
- Promotion of a debate on the pertinence of the information produced, how to better collect it (or facilitate its collection) and cost cuts.

**LA2 – To heighten the use of administrative data for statistical purposes, ensuring the intervention of the National Statistical System from its inception**

### Measures

- Inventory of administrative data appropriate to be used for statistical purposes.
- Implementation of procedures facilitating the collection of administrative data or any other useful information for the production of official statistics.
- Increase in the effort to use administrative data, for the update of sample bases (Statistical Units Register – Enterprises, Farm Register and Master Sample).



- Adequacy of the link between the variable system and the use of administrative sources.
- Test on the use of administrative sources with the purpose of obtaining data on households and individuals, usually collected through censuses, in parallel with the collection of the 2011 Censuses.

### **LA3 – To overall reduce the costs with the production of statistical information**

#### **Measures**

At the **level of the statistical burden** on surveyed entities:

- Implementation of conception and testing methodologies, considering compatibility among the different collection methods and the use of methodologies for the automated set-up of questionnaires.
- Modernisation of survey methods, namely by favouring electronic collection methods.

## STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

- Use of advanced methodologies in the treatment of non-replies and in the estimation of results.

At the **level of statistical activity costs:**

- Use of electronic devices for the collection of data from reporting entities.
- Resort, whenever possible, to interviews by telephone (CATI), as an alternative to direct interviews.
- Launch of the Internet use (CAWI) to obtain data on households and individuals.

**LA4 – To shorten the deadline of availability of information, in compliance with the commitments taken on, namely with international organisations**

### Measures

- Modernisation of methods for the compilation and treatment of data, privileging the use of software allowing for automated data processing and the respective cross-checking with different information sources.

**LA5 – To produce and make available long time series for the most relevant indicators**

**Measures**

- Reconciliation of time series, whenever changes occur in the data production methodology.
- Studies for the retropolation of relevant indicators, ensuring the reconciliation of long series.

**LA6 – To define and implement a data revision policy**

**Measures**

- Implementation of an integrated data revision policy.
- Definition of standard procedures on the contents to be disseminated in case of revisions.

## STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

**LA7 – To align the statistical metadata system with best international practices**

### Measures

- Reformulation of the Concept System, organised into Conceptual Systems.
- Implementation of procedures allowing for the framing of all metadata within recognised good practices.
- Adjustment of the statistical metadata system, with a view to associating data to metadata in the whole lifecycle of the statistical operations.
- Implementation of the Quality Report of statistical operations.

**LA8 – To render the statistical metadata system appropriate to the needs of the interchange of metadata within the National Statistical System and the European Statistical System**

### Measures

- Introduction of the Statistical Data and Metadata Exchange (SDMX) standard system.

### LA9 – To define and implement a dissemination policy for official statistics

#### Measures

- Definition at the level of the Statistical Council of the rules underlying the dissemination of official statistics, as a contribution to an effective coordination of the National Statistical System.
- Modernisation of the statistical dissemination systems of the entities of the National Statistical System.
- Definition of a platform for communicating with users of official statistics, at the level of the entities of the National Statistical System.

### LA10 – To anticipate user needs and develop products and services that are appropriate to different groups of users

#### Measures

- Definition of the most appropriate statistical products and the most effective and fastest communication channels for the different user groups.
- Definition of a user-oriented communication strategy, as regards both present and potential future users.
- Pro-active interaction with different user groups.



## STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

### LA11 – To improve the quality of the supply of dissemination services

#### Measures

- Improvement of communication with different user groups and networks.
- Shortening of reply deadlines, improvement in access to and scope of information, and in communication with users.

### LA12 – To increase proximity to the scientific community

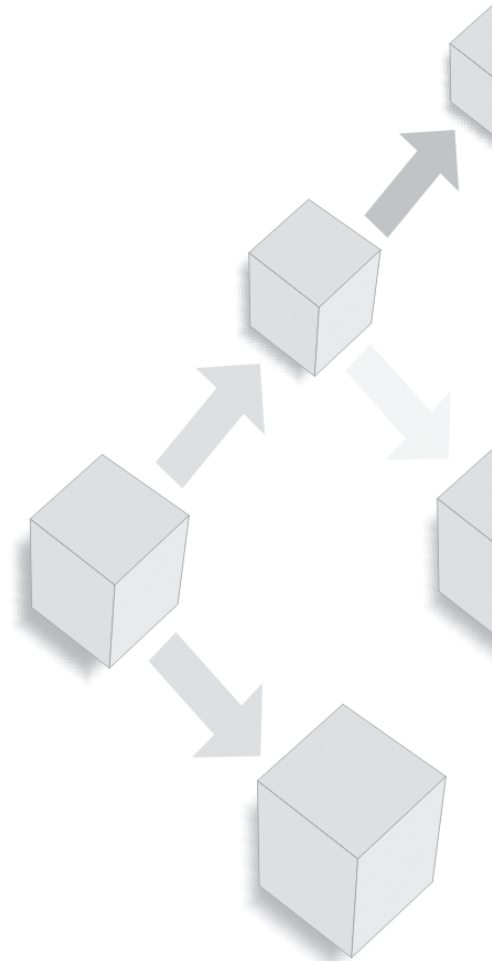
#### Measures

- Easier access by the scientific community to information required for research purposes.
- Improvement in access to microdata.
- Development of partnerships with a number of entities, namely with universities and research centres in research projects.

### LA13 – To increment statistical literacy

#### Measures

- Promotion of dissemination initiatives intended to further statistical literacy, and an adequate utilisation of statistical information by the society.
- Development of partnerships for statistical training, in fields such as statistical methods and interpretation of results.



## STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

### Objective 2

To optimise the functioning of the National Statistical System through the reinforcement of institutional coordination and cooperation mechanisms and the improvement of human resources skills

**LA1 – To promote cooperation among statistical authorities, within the framework of the new Law governing the National Statistical System**

#### Measures

- Streamlining and fine-tuning of the functioning of the Statistical Council with a view to complying with the tasks laid down in the Law governing the National Statistical System.
- Development of statistical production, in cooperation with the National Statistical System, both in the preparation of statistical operations of interest to the

society, and in research integrating sundry data and sources.

- Development of the sharing of background information.
- Methodological harmonisation, in terms of concepts and methods for statistical production.
- Cross-checking of final data for quality control and full consistency.
- Dissemination of knowledge and information through seminars, workshops and other initiatives on matters of interest to the National Statistical System, particularly related to monitoring developments at the European Statistical System level.



**LA2 – To promote an effective process for the delegation of powers, within the framework of the new Law governing the National Statistical System**

#### Measures

- Preparation of the legal and procedural framework or the delegation of powers by Statistics Portugal to other entities, particularly by clarifying its contents and the criteria for the selection of entities to which powers may be delegated.
- Monitoring of the statistical areas delegated by Statistics Portugal, within the framework of close institutional cooperation.

**LA3 – To improve the effectiveness of the National Statistical System in the planning and conduct of statistical operations**

#### Measures

- Identification, at the level of the Statistical Council, of redundancies and possible gaps in the procedures, media used, contents produced and frequency of official statistical information produced by the National Statistical System.
- Reinforcement of coordination procedures within the scope of the National Statistical System, intended to obviate duplications of both surveys and surveyed variables.

## STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

### **LA4 – To implement the Universe and Sample Management System and introduce new sampling methodologies and methods of statistical inference**

#### **Measures**

- Implementation of a new architecture for the selection of universes, sampling and sample bases for a broadly based use within the scope of the National Statistical System.
- Pursuance of the FUESEN (SEN's Statistical Units Register) project with a view to ensuring its shared management, resorting to methodologies agreed with the different entities involved.

- Definition of a "use code" of sampling bases to be adopted by the different entities involved in the National Statistical System.
- Use of new methodologies for the design of samples, associated with new estimators of characteristics and variables.

### LA5 – To prepare a new Master Sample

#### Measures

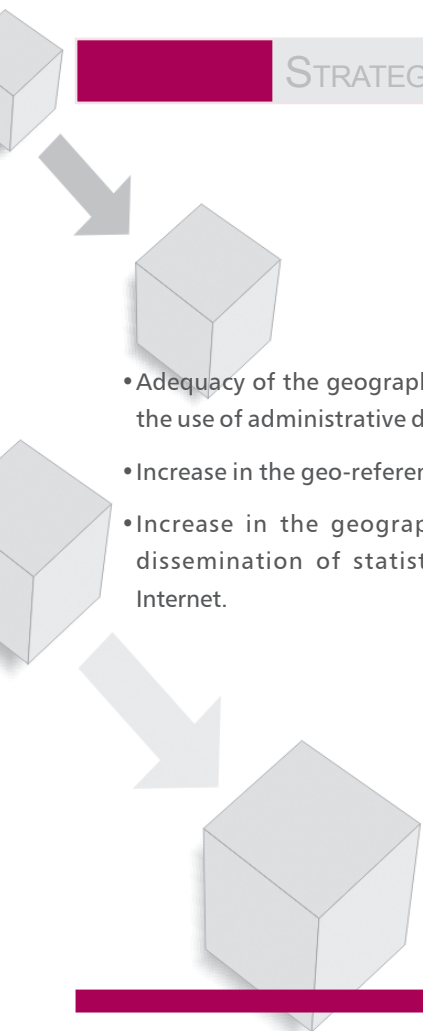
- Study of the preparation of the new Master Sample, within the framework of the 2011 Censuses.
- Definition of the master sample as a sample basis in a multi-purpose environment regarding the collection methods: telephone, direct interview, etc.

### LA6 – To further the utilisation of the Geographical Referencing Infrastructure in the production and release of official statistical information

#### Measures

- Interlinking of the Geographical Referencing Infrastructure of Statistics Portugal with the National and European Geographical Information Infrastructure (SNIG and INSPIRE respectively).
- Adequacy of the geographical data infrastructure so that it meets the geographical data requirements of the Censuses.
- Adequacy of the geographical data infrastructure to the preparation of the new Master Sample.

## STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

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- Adequacy of the geographical data infrastructure to the use of administrative data.
  - Increase in the geo-referencing of sampling bases.
  - Increase in the geographical component in the dissemination of statistical information on the Internet.

**LA7 – To improve institutional links with a view to contributing to increase the quality of the information produced in the National Statistical System**

### Measures

- Establishment and implementation of procedures for the quality control of information made available by the different entities of the National Statistical System and associated metadata.
- Intensification of the use of technical and scientific standardisation instruments, particularly at the level of metadata and formats for the interchange of data among entities.
- Carrying-out of quality audits to official statistics.

**LA8 – To intensify participation in the activities of the United Nations Statistics Commission, the European Statistical System and in activities of statistical cooperation for development**

#### Measures

- Participation in strategic initiatives of the European Statistical System, namely in the preparation of legislation and in compliance with Community statistical commitments.
- Participation in cooperation programmes interlinked with the strategic guidelines of Portuguese cooperation.

**LA9 – To promote recruitment, vocational training and the conditions for the permanence of staff who is adequate to the needs of the National Statistical System**

#### Measures

- Implementation of a structured vocational training plan, designed according to a system approach, intended to stimulate the professional career and personal development of all statistical “makers”.
- Programming of recruitment requirements for the entities of the National Statistical System in the 2008-2012 time horizon.
- Analysis and implementation of solutions that, in view of the labour market conditions, enable the entities of the National Statistical System to hire and maintain the experts required by statistical tasks.

## STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

### Objective 3

To ensure statistical production in areas that are particularly relevant for understanding current societies, with special focus on their spatial breakdown

**LA1 – To increase the efficiency of the use of National Statistical System's resources, making it possible to reconcile the reinforcement of the production of non-economic statistics with the development of the production of economic statistics**

#### Measures

- Strengthened integration of statistical information sources and access to administrative sources.
- Modernisation of methods for the production and dissemination of statistics.

**LA2 – To ensure essential information in the relevant social and welfare areas**

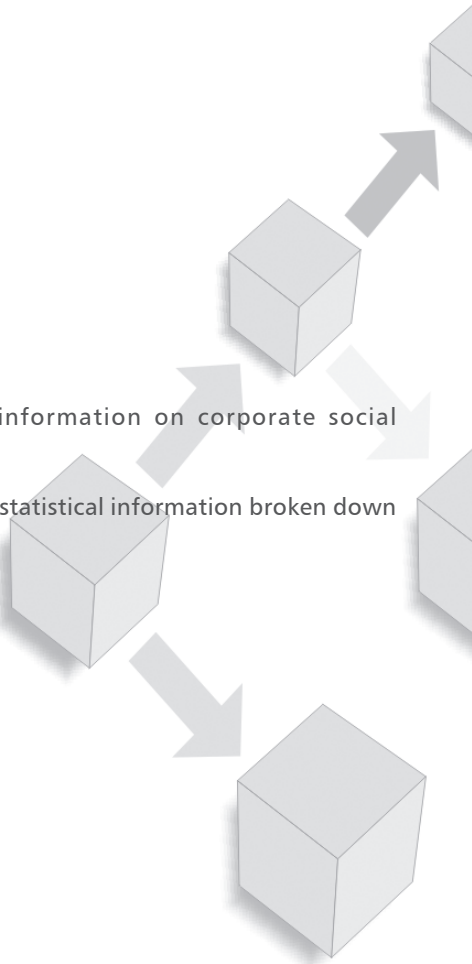
#### Measures

- Strengthening and improvement of the production of information in areas such as: population ageing, social inclusion/exclusion, poverty and income distribution, socio-demographic behaviours, health, social protection, life-long learning, disability and rehabilitation, accidents at work and occupational diseases, and food safety.
- Availability of indicators making it possible to evaluate and improve knowledge on migration, as well indicators on the integration of immigrants at different

levels (e.g. work, housing, health, education, civic participation).

- Development of statistics conducive to a better evaluation of issues associated with regional development asymmetries, individual mobility and connectivity quality (traffic congestion in large metropolitan areas, efficiency of public transport networks).
- Reinforcement of interlinking between labour market statistics, namely in the field of public employment, and economic, education and research statistics.

- Production of information on corporate social responsibility.
- Widening of the statistical information broken down by gender.



## STRATEGIC OBJECTIVES / ACTION LINES (LA) / MEASURES

### **LA3 – To develop and consolidate the production of sectoral economic statistics and environmental statistics**

#### **Measures**

- Development and update of the production of derivative statistics, namely satellite accounts.
- Development of statistics on business environment, entrepreneurship and globalisation, namely for the evaluation of sectoral dynamics and competition factors as well as the behaviour of branches of foreign enterprises operating in Portugal.
- Development of statistical production in the following fields: science, technology, innovation and information society, knowledge and culture.

- Establishment of new cooperation mechanisms between Statistics Portugal and the different government entities in the energy and environmental areas, with a view to widening and consolidating production of official statistics in these areas.
- Production of information required for monitoring business activity in the industrial and environmental areas (or eco-industries).
- Establishment of a solid institutional cooperation intended to improve statistical information in the agricultural sector, namely as regards biological agriculture and agro-environmental and rural development indicators.
- Production of sustainable development indicators.





## CRITICAL SUCCESS FACTORS FOR ACHIEVING THE LGAEN

- Publication and implementation of the new Law governing the National Statistical System.
- Commitment by all entities responsible for the production of official statistics in the alignment of their annual activities with the LGAEN 2008-2012.
- Effective cooperation among entities, within and outside the National Statistical System.
- Use of the administrative data for statistical purposes available in the various government entities, to allow for the reduction of the statistical burden on citizens and enterprises and of costs for the State Budget.
- Guarantee of financing levels that are adequate to the current and emerging tasks of the entities responsible for the production of official statistics.
- Adequacy of human resources, both as regards quantity and competences, to the needs of the National Statistical System.
- Furthering of statistical literacy at the various levels of society.
- Development and implementation of objective-based management methodologies by all entities of the National Statistical System.
- Organisational stability of the entities comprising the National Statistical System, thereby ensuring continuity in statistical production.

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