Methodological notes: thematic tables

Measurement of the current situation of countries and the rate of change

The **situation** a country is in, according to each indicator, is given by the latest available value for that indicator.

Each country is assigned a color according to the distribution of values on each indicator,[1] and an average of these values is then given for all the indicators in that area. In this way a self-referential ranking is obtained, independent of distance from goals or from specific conceptually defined levels.

This ranking was only applied to those countries with information available for at least half the indicators that make up each overall thematic area.

To avoid giving a false impression that the data are exact values, the average values were rescaled to create four country categories:

Countries in better situation	▬ (blue)
Countries above average	▬ (green)
Countries below average	▬ (yellow)
Countries in worse situation	▬ (orange)

Countries for which sufficient information to be included in the ranking is lacking (*Countries with insufficient data to summarize the area*) are also shown.

Recent evolution

The evolution of countries on each indicator is evaluated by comparing the latest data available with previous information. This procedure involves assessing the country's initial and final levels in the two latest reports. The rate of change is the relative proportion of variation in relation to the latest data available, which is why this is a rate of variation (an incremental rate based on 100).

The values for this rate of change have also been rescaled in sections (using a reference scale of 1 to 5), and in the tables these appear in a column to the right of the current indicator value. A series of symbols are used to illustrate changes in order to make the information easier to read (numerical values are not used because they would tend to give the impression that the information is exact, which in this case it is not).

The categories defined in this rescaling are as follows:

→	*Significant progress*
→	*Slight progress*
॥	*Stagnant*
←	*Regression*
←	*Major regression*

Significant progress applies to those countries which are progressing at rates above the average for all countries making progress.

Slight progress applies to those countries which are progressing at rates below the average for all countries making progress.

Stagnant refers to those countries where no changes (or quantitatively insignificant changes) have been recorded over the period in question.

Regression applies to those countries which are regressing at rates below the average for all countries regressing (i.e. they are regressing more slowly).

Major regression applies to those countries which are regressing at rates above the average for all countries regressing (i.e. they are regressing more rapidly).

In addition, an average of progress and regression of the indicators is built for each dimension for which information on recent evolution is available. The average appears in the column "Recent evolution" of the area, and values are also rescaled to obtain the aforementioned five categories. ■

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1   For this, the variable was normalized (by subtracting the mean and dividing by the standard deviation) and then the mean positive values and the mean negative values for the normalized indicator were calculated. The four categories were established according to the values above and below the mean positive values for the normalized indicator, and the values above and below the mean negative values for the normalized indicator.

Basic Capabilities Index (BCI) and Gender Equity Index (GEI)

BCI

The Basic Capabilities Index (BCI) is an index-summary developed by Social Watch[1] that compares and classifies countries in accordance with their progress in social development. This is a useful tool for monitoring the evolution of basic indicators and to make comparisons between and within countries. The BCI evaluates society in different countries as regards some basic minimum capabilities that are the essential starting conditions to enable people to have an adequate quality of life.

The index uses three indicators to identify situations of poverty: survival until the age of 5, the percentage of children who reach the 5th grade at school and the percentage of births attended by skilled health personnel. These indicators express different dimensions that are included in internationally agreed development goals (education, infant health and reproductive health).

Unlike other poverty indicators, such as those used by the World Bank (which consider the number of people living on less than one or two dollars per day) or the classification developed by the UNDP based on the Human Development Index (which combines income figures with health and education indicators) the BCI is based on the latest information available for each country and is easier to construct. It can be applied on the sub-national and municipal levels and does not depend on costly household surveys, which indexes based on income require.

The BCI does not use income as an indicator. It employs a definition of poverty which considers the level of development of a person's capabilities and the possibility to exercise and enjoy his or her human rights to a greater or lesser extent. This index has proved to be highly correlated with measurements of other human capabilities that reflect the social development of countries.

Each country is assigned a value on the BCI, and then its evolution over time can be evaluated and comparisons with other countries can be made. The BCI indicators attain their maximum level when all women receive skilled health care during childbirth, when no child drops out of school before completing the fifth grade and when infant mortality is reduced to its minimum possible level of less than five deaths among children under 5 per thousand live births. These indicators are closely connected to the capabilities that the members of a society must have. These capabilities mutually reinforce each other to make greater individual and collective development possible. Particularly important in this context are the capabilities that facilitate the incorporation of young people into society, as this is essential to promote the future development of countries.

Note that a BCI value of nearly 100 does not necessarily mean a high level of social development; it merely means the country has achieved universal coverage in the essential minimum requirements to be able to progress towards improved well-being. This is the starting point, not the finish line.

GEI

Social Watch developed the Gender Equity Index (GEI) to make gender inequality situations in countries visible and measurable, and to monitor their evolution over time. The GEI is based on information that is available and comparable internationally. It makes it possible to position and classify countries in accordance with a selection of important indicators of gender inequality in the dimensions of education, economic participation and empowerment.

The GEI gives a simple and direct reading so countries can be compared easily. For the purposes of measurement, proportional relations have been ascertained, in other words the ratio between the sexes, so the structure of opportunities as regards gender inequity can be inferred.

The index measures the gap between women and men, not their well-being. Thus, for example, a country in which young people of both sexes have equal access to university education receives a value of 100 on this point, and a country in which girls and boys are both equally impeded from completing their primary education would also receive a value of 100. This does not mean that the education is of adequate quality but that, in this case, girls do not suffer from inequity in participation.

The GEI is calculated to respond to the need to reflect all situations that are unfavourable to women. Therefore, when there is a proportional relation disadvantageous to women in comparison to men, the GEI does not register its maximum value of 100 points. Thus the final value attained depends on the degree of negative inequity for women in a given country or region, because it reflects inequity in an inversely proportional way: the greater the inequity the lower the value on the index, and vice versa.

No indicator value can exceed 100 points (complete equity in participation)[2] even if there are inequities that are positive for women. This asymmetry means the GEI cannot and should not be read as a percentage of participation of the population in gender relations because the proportion of participation may ultimately register as being very different if some of the indicators are favourable to women. ▪

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1 The BCI was originally based on the Quality of Life Index developed by the non-governmental organization Action for Economic Reforms-Philippines, which in turn was derived from the Capability Poverty Index proposed by Professor Amartya Sen and popularised as the United Nations Development Programme (UNDP) Human Development Index.

2 The relative participation of women in one specific area (for example 'university professionals', which is one of the four indicators in the 'empowerment' dimension) is divided by the relative weight of men in that situation. The ratio obtained is multiplied by 100. If the resulting value is over 100, indicating that women's participation exceeds that of men, the value is taken as 100. This is done so that, in the final value on the index, participation rates that are favourable to women in some specific situations shall not conceal negative participation rates in others.

METHODOLOGICAL NOTES FOR THE ICB

Procedure 1. There is no information for the country in one of the indicators of the index for the current period, but information does exist for the previous period. In order to calculate the present value of the BCI the indicator's data was standardized (subtracting the mean and dividing by the standard deviation), and then the mean positive and negative values were calculated to form four categories (best situation, above average, below average and worst situation). The country was situated in the corresponding category according to the value of the indicator of the previous period and the group indicator mean was assigned to it, now on the basis of present period data. That is, this indicator is assumed to be in an "average" situation within the group.

Procedure 2. There is no information for the country in at least one of the indicators of the index for neither the current nor the previous period. In order to calculate the present BCI value, the average was calculated for the indicators for which the country showed data (I1+I2, I1+I3 or I2+I3, as appropriate), within its region. The resulting variable was standardized and then re-scaled above and below the standardized mean according to the four categories generated, placing the country within this categorization and awarding it the information for the absent indicator corresponding to its lower limit. ▪