

A Quarterly Review of Social Reports and Research on Social Indicators, Social Trends, and the Quality-of-Life.
News Included of Research Committee 55 on Social Indicators and Social Reporting of the International Sociological Association.

REVIEWS OF WEB-BASED SOCIAL REPORTS,

REVIEW 2:

THE UNITED NATIONS DEVELOPMENT PROGRAMME'S

Editor's Note: One characteristic of the field of social indicators, social reporting, and well-being/quality-of-life studies is so evident today that it almost escapes explicit notice—the permeation of the field by the Internet and the World Wide Web. The concepts of social indicators and programs of social reporting commenced in the 1960s and 1970s—long before the innovation and diffusion of the Web in the 1990s and early 2000s. The Web and the associated availability of all types of information through computers and related high speed electronic devices now is an ever-present aspect of many lives throughout the world. Social indicators, social reports, and well-being/quality-of-life studies are no exception. Today, all periodic international and national social reports as well as local community social reports are published online on the Web and many are published exclusively on the Web. This is associated with a change in the nature of human access to information and storage of that information that is likely to continue indefinitely into the future.

In recognition of this technological change, *SINET* will publish a continuing series of reviews of Web-based social reports. Each review will describe what is available on the Webpage of the report and will ask questions such as: To what extent does the report address the long standing objectives of sys-

tematic reporting on social issues for the purpose of public enlightenment and policy guidance? What aspects/domains of social life are reported? What social indicators? What are the trends? Are composite indices reported? Is wellbeing/quality of life an organizing, or at least underlying, principle? The first in this series appeared in the May-August 2011 issue—a review of the national social report that is one of the oldest and longest-running series, the United Kingdom's annual *Social Trends* which was initiated in 1970.

The present review examines the *Human Development Index (HDI)*, which is produced by the United Nations Human Development Programme (UNDP). The HDI is one of the most widely known composite social indicators and its associated annual reports are widely cited. Most quality-of-life/social indicators researchers are familiar, to some extent, with the HDI. Let's take a closer look.

Introduction

The general website for the Human Development Reports is: <http://hdr.undp.org/en/humandev/>. The Web-based free encyclopedia, Wikipedia site also has a useful description and review of the HDI conceptual base, its methodology, and its annual reports: http://en.wikipedia.org/wiki/Human_Development_Index.

The Main Page of the Human Development Reports Website states:

The first *Human Development Report* in 1990 opened with the simply stated premise that has guided all subsequent Reports: "People are the real wealth of" (Continued on next page.)

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Editor's Note:

This issue begins with the second of our continuing series of reviews of Web-Based social reports – a review of the United Nations Development Programme's Human Development Index (HDI). The second item in this issue is an announcement of the change in the date and location of the 2012 Conference of the International Society for Quality of Life Studies from ISQOLS President Heinz-Herbert Noll. Other announcements include Wolfgang Glatzer's Global Handbook of Well-Being project and a tribute to the 75th birthday of Wolfgang Zapf, one of the pioneers of the social indicators movement and a developer of the System of Social Indicators for Germany

SINET

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a nation.” By backing up this assertion with an abundance of empirical data and a new way of thinking about and measuring development, the *Human Development Report* has had a profound impact on policies around the world.

It then contains the following quote from Amartya Sen, Professor of Economics, Harvard University, Nobel Laureate in Economics, 1998:

“Human development, as an approach, is concerned with what I take to be the basic development idea: namely, advancing the richness of human life, rather than the richness of the economy in which human beings live, which is only a part of it.”

This is followed by statements from Pakistani economist Mahbub ul Haq (1934-1998), Founder of the Human Development Report, and Helen Clark, Administrator, United Nations Development Programme. Clark states:

“The human development approach is as relevant as ever to making sense of our changing world and finding ways to improve people’s well-being. Human development is an evolving idea, not a fixed, static set of precepts. And as the world changes, analytical tools and concepts will also continue to evolve. Yet the core insight at the center of the human development approach remains constant and as valid today as it was two decades ago: Development is ultimately best measured by its impact on individual lives.

That was the original vision and remains the great achievement of the creators of the Human Development Reports, Mahbub ul-Haq of Pakistan and his close friend and collaborator, Amartya Sen of India, working with other leading development thinkers. Their concept has guided more than 20 years of global *Human Development*

Reports, more than 600 *National Human Development Reports*—all researched, written and published in their respective countries—as well as the many provocative regionally focused reports supported by UNDP’s regional bureaus.

Perhaps most important, the human development approach has profoundly affected an entire generation of policy-makers and development specialists around the world—including thousands within UNDP itself and elsewhere in the UN system.”

The Human Development Reports Main Page has several tabs at its top for the following linked Webpages:

- REPORTS (1990-2011)
- INDICES AND DATA
- COUNTRIES
- RESOURCES
- MEDIA
- ABOUT US
- SEARCH

Each of these tabs leads to other Webpages with many more details on their various subjects.

The REPORTS tab leads to a page that describes the 21 years of Human Development Reports and has Webpage links to descriptions of the reports, pdfs of the texts of the global and regional reports, and thematic maps on various topics. Printed copies of the Annual Report also can be ordered.

The theme of the *Human Development Report 2011 is Sustainability and Equity: A Better Future for All, with the description:*

The 2011 Human Development Report argues that the urgent global challenges of sustainability and equity must be addressed together—and identifies policies on the national and global level that could spur mutually reinforcing progress towards these interlinked goals.

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Bold action is needed on both fronts, the Report contends, if the recent human development progress for most of the world's poor majority is to be sustained, for the benefit of future generations as well as for those living today. Past Reports have shown that living standards in most countries have been rising - and converging - for several decades now. Yet the 2011 Report projects a disturbing reversal of those trends if environmental deterioration and social inequalities continue to intensify, with the least developed countries diverging downwards from global patterns of progress by 2050.

The Report shows further how the world's most disadvantaged people suffer the most from environmental degradation, including in their immediate personal environment, and disproportionately lack political power, making it all the harder for the world community to reach agreement on needed global policy changes. The Report also outlines great potential for positive synergies in the quest for greater equality and sustainability, especially at the national level. The Report further emphasizes the human right to a healthy environment, the importance of integrating social equity into environmental policies, and the critical importance of public participation and official accountability. The 2011 Report concludes with a call for bold new approaches to global development financing and environmental controls, arguing that these measures are both essential and feasible

The HDI Methodology

Before describing some of the substantive findings from the 2011 and prior HDI Reports, it is important to point out to SINET readers the changes in the methodology of the HDI introduced in 2011.

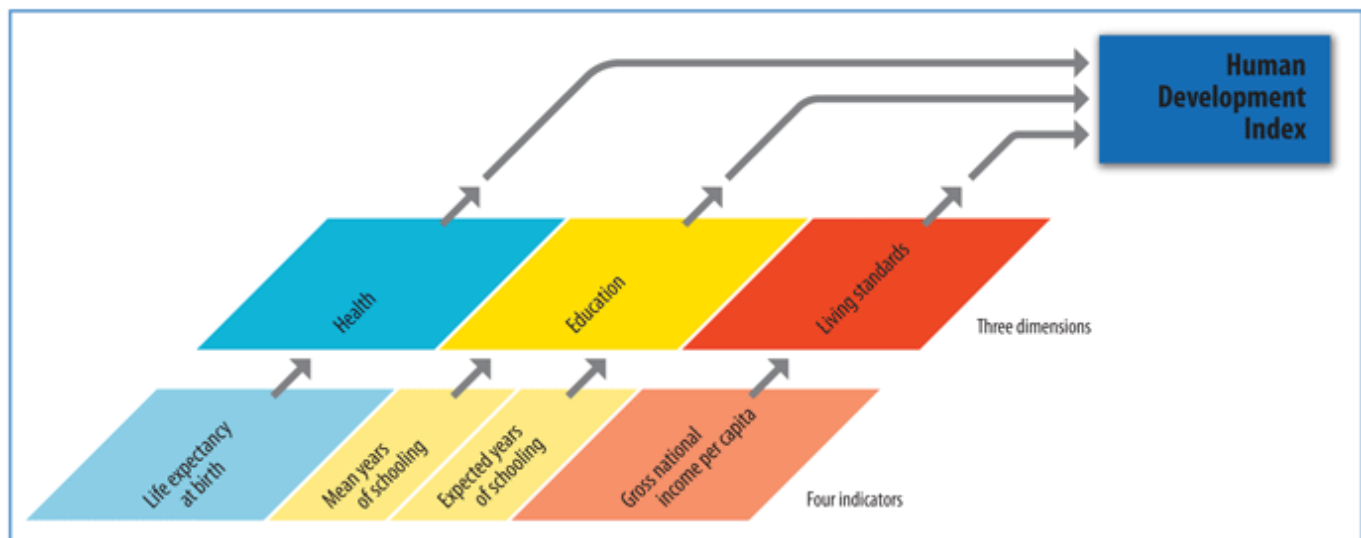
The Indices and Data page of the Website states:

The first Human Development Report introduced a new way of measuring development by combining indicators of life expectancy, educational attainment and income into a composite human development index, the HDI. The breakthrough for the HDI was the creation of a single statistic which was to serve as a frame of reference for both social and economic development. The HDI sets a minimum and a maximum for each dimension, called goalposts, and then shows where each country stands in relation to these goalposts, expressed as a value between 0 and 1.

This is followed by the graphic:

Components of the Human Development Index

The HDI—three dimensions and four indicators



Note: The indicators presented in this figure follow the new methodology, as defined in box 1.2.

Source: HDRO.

and the descriptions:

The education component of the HDI is now measured by mean of years of schooling for adults aged 25 years and expected years of schooling for children of school entering age. Mean years of schooling is estimated based on educational attainment data from censuses and surveys available in the UNESCO Institute for Statistics database and Barro and Lee (2010) methodology). Expected years of schooling estimates are based on enrolment by age at all levels of education and population of official school age

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for each level of education. Expected years of schooling is capped at 18 years. The indicators are normalized using a minimum value of zero and maximum values are set to the actual observed maximum value of mean years of schooling from the countries in the time series, 1980–2010, that is 13.1 years estimated for Czech Republic in 2005. Expected years of schooling is maximized by its cap at 18 years. The education index is the geometric mean of two indices.

The life expectancy at birth component of the HDI is calculated using a minimum value of 20 years and maximum value of 83.4 years. This is the observed maximum value of the indicators from the countries in the time series, 1980–2010. Thus, the longevity component for a country where life expectancy birth is 55 years would be 0.552.

For the wealth component, the goalpost for minimum income is \$100 (PPP) and the maximum is \$107,721 (PPP), both estimated during the same period, 1980–2011.

The decent standard of living component is measured by GNI per capita (PPP\$) instead of GDP per capita (PPP\$). The HDI uses the logarithm of income, to reflect the diminishing importance of income with increasing GNI. The scores for the three HDI dimension indices are then aggregated into a composite index using geometric mean.

Most social indicators/quality-of-life researchers know that it was Sen's conceptual work on capabilities and functionings for a productive and healthy life that provided the underlying conceptual framework of the HDI. The capabilities approach focuses on positive freedom a person's actual ability to be or do something, rather than on [negative freedom](#) approaches, which are common in economics and simply focuses on non-interference. The Wikipedia article cited above indicates that "... Haq was sure that a simple composite measure of human development was needed in order to convince the public, academics, and policy-makers that they can and should evaluate development not only by economic advances but also improvements in human well-being. Sen initially opposed this idea, but he went on to help Haq develop the Human Development Index (HDI). Sen was worried that it was difficult to capture the full complexity of human capabilities in a single index but Haq persuaded him that only a single number would shift the attention of policy-makers from concentration on economic to human well-being."

Thus, as indicated in the graphic above, statistical measures for each of the four components are combined in to the single number HDI.

Again, however, it is important to note the changes in

the education and economic standard of living indicators with the 2011 Report. Prior to that Report, the HDI combined statistical measures of three dimensions for each country:

- Life expectancy at birth (LE), as an index of population health and longevity
- Knowledge and education, as measured by the adult literacy rate (ALR, with two-thirds weighting) and the combined primary, secondary, and tertiary gross enrollment ratio (CGER, with one-third weighting).
- Standard of living as indicated by the natural logarithm of gross domestic product per capita (GDP_{pc}) at purchasing power parity

The HDI is based on transformations of statistics for these measures to unit-free indices. Consider one of these measures, say x . To transform it into a unit-free index scaled between 0 and 1 (in order to allow the different indices to be added together), apply the following formula:

$$x - index = \frac{x - \min(x)}{\max(x) - \min(x)}$$

where $\min(x)$ and $\max(x)$ are the lowest and highest values the x statistic can attain, respectively.

The *original formula for the HDI* then applies a uniformly weighted sum of 1/3 contributed by each of following four Life Expectancy, Education, and GDP indexed statistics:

$$\text{Life Expectancy Index (LEI)} = \frac{LE - 25}{85 - 25}$$

$$\text{Education Index (EI)} = \frac{2}{3} \times ALI + \frac{1}{3} \times GEI$$

$$\text{where Adult Literacy Index (ALI)} = \frac{ALR - 0}{100 - 0}$$

$$\text{and Gross Enrollment Index (GEI)} = \frac{CGER - 0}{100 - 0}$$

$$GDPI = \frac{\log(GDP_p) - \log(100)}{\log(40000) - \log(100)}$$

so that the *Original HDI* =

$$\left(\frac{1}{3} \times E \right) + \left(\frac{1}{3} \times E \right) + \left(\frac{1}{3} \times GDPI \right)$$

Because the numerical values produced by this original additive, equal weights formula were not sensitive to divergences in country performance on any one of the three dimensions, that is, because poor performance on any one dimension in a country could be compensated for by high performance in any other dimension, and in order to improve its measures of the education and

income components of Sen's capabilities concept, beginning with the 2011 HDI Report, the HDI combines the following statistical measures of the three dimensions:

- A long and healthy life: Life expectancy at birth (LE)
- Education index: Mean years of schooling (MYS) and Expected years of schooling (EYS)
- A decent standard of living: Gross National Income per capita (GNI_{pc}) in purchasing power parity with the United States dollar (PPP US\$)

These are the dimensions and indicators currently used in the revised HDI as described above under the Components of the Human Development Index graphic.

The revised formula for the HDI then is:

$$\text{Life Expectancy Index (LEI)} = \frac{LE - 20}{83.4 - 20}$$

$$\text{Education Index (EI)} = \frac{\sqrt{MYSI \cdot EYSI}}{0.951}$$

where

$$\text{Mean Years of Schooling Index (MYSI)} = \frac{MYS}{13.2}$$

$$\text{Expected Years of Schooling Index (EYSI)} = \frac{EYS}{20.6}$$

$$\text{Income Index (II)} = \frac{\ln(GNI_p) - \ln(100)}{\ln(107,721) - \ln(100)}$$

and then the HDI is calculated as the geometric mean of the previous three normalized indices:

$$\text{Revised HDI} = \sqrt[3]{LEI \cdot EI \cdot II}$$

Supplementary Human Development Indices

The HDI now is supplemented with three other indices reported under the Indices and Data tab on the Human Development Reports site.

The *Inequality-Adjusted HDI (IHDI)*, introduced in the 2010 Report, reflects inequality in each dimension of the HDI. Under perfect equality the IHDI is equal to the HDI, but falls below the HDI when inequality rises. The objective of the IHDI is to measure the actual level of human development (taking into account inequality) of a country, with the HDI viewed as an index of the potential human development that could be achieved if there is no inequality.

Similarly, the *Gender Inequality Index (GII)* addresses disadvantages facing women and girls which are a major source of inequality. Findings from the GII indicate that gender inequality varies tremendously across countries—the losses in achievement due to gender inequality (not directly comparable to total inequality losses because different variables are used) range from 4.9 percent to 76.9 percent. It also has

been found that countries with unequal distribution of human development also experience high inequality between women and men, and countries with high gender inequality also experience unequal distribution of human development.

The *Multidimensional Poverty Index (MPI)* is the third supplementary index to the HDI. Launched in July 2010, the objective of this new poverty measure is to give a “multidimensional” picture of people living in poverty that could help target development resources more effectively. The MPI identifies deprivations across the same three dimensions as the HDI and shows the number of people who are multidimensionally poor (suffering deprivations in 33% of weighted indicators) and the number of deprivations with which poor households typically contend. It can be deconstructed by region, ethnicity and other groupings as well as by dimension, making it an apt tool for policymakers.

Some Empirical Findings

The Human Development Reports Website is a treasure trove of data and findings, far too many to report or even summarize here. As mentioned above, the various annual HDI Reports that can be accessed there in pdf form. The Indices and Data page contains additional data, including a number of graphs and maps. The numerical values of all of the component indicator time series for the HDI and the revised HDI also are accessible.

One item of general interest in the annual HDI Reports is the rankings assigned to the countries. The 2011 Report gives rankings for a total of 187 countries. These are grouped into quartiles labeled from high to low as: Very High Human Development, High Human Development, Medium Human Development, and Low Human Development. The full table for all 187 countries for three of the indices described above, the HDI, the IHDI, and the GII, from pp. 17-20 of the Summary of the 2011 Report is reproduced below. Due to differential data availability across the countries, the indices use data from different years; details are given in the Statistical Annex to the full Report. In addition, due to the lack of availability of the data necessary for their computation, the IHDI and GII indices are reported for 134 and 142 countries, respectively.

The numerical values of the indices, the rankings of the countries, and the quartiles have a good amount of face validity with what one might expect, given the composition of the indices. Developed countries with relatively small, homogeneous populations tend to be ranked in the first quartile. Larger, more geographically and racially/ethnically diverse populations and less developed countries tend to rank lower. A high ranking on the HDI scale does not ensure a comparable ranking on the IHDI and GII scales. The United States, which ranks 4th on the HDI, 23rd on the IHDI, and 47th on the GII, is a case in point.

(Continued on page 9.)

HDI rank		Human Development Index (HDI) Value	Inequality-adjusted HDI		Gender Inequality Index		Multidimensional Poverty Index
			Value	Rank	Value	Rank	
VERY HIGH HUMAN DEVELOPMENT							
1	Norway	0.943	0.89	1	0.075	6	..
2	Australia	0.929	0.856	2	0.136	18	..
3	Netherlands	0.91	0.846	4	0.052	2	..
4	United States	0.91	0.771	23	0.299	47	..
5	New Zealand	0.908	..	..	0.195	32	..
6	Canada	0.908	0.829	12	0.14	20	..
7	Ireland	0.908	0.843	6	0.203	33	..
8	Liechtenstein	0.905	..	..	..	..	..
9	Germany	0.905	0.842	7	0.085	7	..
10	Sweden	0.904	0.851	3	0.049	1	..
11	Switzerland	0.903	0.84	9	0.067	4	..
12	Japan	0.901	..	..	0.123	14	..
13	Hong Kong, China (SAR)	0.898	..	..	..	..	..
14	Iceland	0.898	0.845	5	0.099	9	..
15	Korea, Republic of	0.897	0.749	28	0.111	11	..
16	Denmark	0.895	0.842	8	0.06	3	..
17	Israel	0.888	0.779	21	0.145	22	..
18	Belgium	0.886	0.819	15	0.114	12	..
19	Austria	0.885	0.82	14	0.131	16	..
20	France	0.884	0.804	16	0.106	10	..
21	Slovenia	0.884	0.837	10	0.175	28	0
22	Finland	0.882	0.833	11	0.075	5	..
23	Spain	0.878	0.799	17	0.117	13	..
24	Italy	0.874	0.779	22	0.124	15	..
25	Luxembourg	0.867	0.799	18	0.169	26	..
26	Singapore	0.866	..	..	0.086	8	..
27	Czech Republic	0.865	0.821	13	0.136	17	0.01
28	United Kingdom	0.863	0.791	19	0.209	34	..
29	Greece	0.861	0.756	26	0.162	24	..
30	United Arab Emirates	0.846	..	..	0.234	38	0.002
31	Cyprus	0.84	0.755	27	0.141	21	..
32	Andorra	0.838	..	..	..	..	..
33	Brunei Darussalam	0.838	..	..	..	..	..
34	Estonia	0.835	0.769	24	0.194	30	0.026
35	Slovakia	0.834	0.787	20	0.194	31	0
36	Malta	0.832	..	..	0.272	42	..
37	Qatar	0.831	..	..	0.549	111	..
38	Hungary	0.816	0.759	25	0.237	39	0.016
39	Poland	0.813	0.734	29	0.164	25	..
40	Lithuania	0.81	0.73	30	0.192	29	..
41	Portugal	0.809	0.726	31	0.14	19	..
42	Bahrain	0.806	..	..	0.288	44	..
43	Latvia	0.805	0.717	33	0.216	36	0.006
44	Chile	0.805	0.652	44	0.374	68	..
45	Argentina	0.797	0.641	47	0.372	67	0.011
46	Croatia	0.796	0.675	38	0.17	27	0.016
47	Barbados	0.793	..	..	0.364	65	..
HIGH HUMAN DEVELOPMENT							
48	Uruguay	0.783	0.654	43	0.352	62	0.006
49	Palau	0.782	..	..	..	..	..
50	Romania	0.781	0.683	36	0.333	55	..
51	Cuba	0.776	..	..	0.337	58	..
52	Seychelles	0.773	..	..	..	..	..
53	Bahamas	0.771	0.658	41	0.332	54	..
54	Montenegro	0.771	0.718	32	..	..	0.006
55	Bulgaria	0.771	0.683	37	0.245	40	..
56	Saudi Arabia	0.77	..	..	0.646	135	..
57	Mexico	0.77	0.589	56	0.448	79	0.015
58	Panama	0.768	0.579	57	0.492	95	..
59	Serbia	0.766	0.694	34	..	..	0.003
60	Antigua and Barbuda	0.764	..	..	..	..	..
61	Malaysia	0.761	..	..	0.286	43	..
62	Trinidad and Tobago	0.76	0.644	46	0.331	53	0.02
63	Kuwait	0.76	..	..	0.229	37	..

HDI rank		Human Development Index (HDI) Value	Inequality-adjusted HDI		Gender Inequality Index		Multidimensional Poverty Index
			Value	Rank	Value	Rank	
HIGH HUMAN DEVELOPMENT							
64	Libya	0.76	..	..	0.314	51	..
65	Belarus	0.756	0.693	35	..	..	0
66	Russian Federation	0.755	0.67	39	0.338	59	..
67	Grenada	0.748	..	..	..	..	..
68	Kazakhstan	0.745	0.656	42	0.334	56	0.002
69	Costa Rica	0.744	0.591	55	0.361	64	..
70	Albania	0.739	0.637	49	0.271	41	0.005
71	Lebanon	0.739	0.57	59	0.44	76	..
72	Saint&Kitts and Nevis	0.735	..	..	..	..	..
73	Venezuela, Bolivarian Republic of	0.735	0.54	67	0.447	78	..
74	Bosnia and Herzegovina	0.733	0.649	45	..	..	0.003
75	Georgia	0.733	0.63	51	0.418	73	0.003
76	Ukraine	0.729	0.662	40	0.335	57	0.008
77	Mauritius	0.728	0.631	50	0.353	63	..
78	Former Yugoslav Republic of Macedonia	0.728	0.609	54	0.151	23	0.008
79	Jamaica	0.727	0.61	53	0.45	81	..
80	Peru	0.725	0.557	63	0.415	72	0.086
81	Dominica	0.724	..	..	..	..	..
82	Saint Lucia	0.723	..	..	..	..	..
83	Ecuador	0.72	0.535	69	0.469	85	0.009
84	Brazil	0.718	0.519	73	0.449	80	0.011
85	Saint Vincent and the Grenadines	0.717	..	..	..	..	..
86	Armenia	0.716	0.639	48	0.343	60	0.004
87	Colombia	0.71	0.479	86	0.482	91	0.022
88	Iran, Islamic Republic of	0.707	..	..	0.485	92	..
89	Oman	0.705	..	..	0.309	49	..
90	Tonga	0.704	..	..	..	..	..
91	Azerbaijan	0.7	0.62	52	0.314	50	0.021
92	Turkey	0.699	0.542	66	0.443	77	0.028
93	Belize	0.699	..	..	0.493	97	0.024
94	Tunisia	0.698	0.523	72	0.293	45	0.01
MEDIUM HUMAN DEVELOPMENT							
95	Jordan	0.698	0.565	61	0.456	83	0.008
96	Algeria	0.698	..	..	0.412	71	..
97	Sri Lanka	0.691	0.579	58	0.419	74	0.021
98	Dominican Republic	0.689	0.51	77	0.48	90	0.018
99	Samoa	0.688	..	..	..	..	..
100	Fiji	0.688	..	..	..	..	..
101	China	0.687	0.534	70	0.209	35	0.056
102	Turkmenistan	0.686	..	..	..	..	..
103	Thailand	0.682	0.537	68	0.382	69	0.006
104	Suriname	0.68	0.518	74	..	..	0.039
105	El Salvador	0.674	0.495	83	0.487	93	..
106	Gabon	0.674	0.543	65	0.509	103	0.161
107	Paraguay	0.665	0.505	78	0.476	87	0.064
108	Bolivia, Plurinational State of	0.663	0.437	87	0.476	88	0.089
109	Maldives	0.661	0.495	82	0.32	52	0.018
110	Mongolia	0.653	0.563	62	0.41	70	0.065
111	Moldova, Republic of	0.649	0.569	60	0.298	46	0.007
112	Philippines	0.644	0.516	75	0.427	75	0.064
113	Egypt	0.644	0.489	85	..	..	0.024
114	Occupied Palestinian Territory	0.641	..	..	..	..	0.005
115	Uzbekistan	0.641	0.544	64	..	..	0.008
116	Micronesia, Federated States of	0.636	0.39	94	..	..	..
117	Guyana	0.633	0.492	84	0.511	106	0.053
118	Botswana	0.633	..	..	0.507	102	..
119	Syrian Arab Republic	0.632	0.503	80	0.474	86	0.021
120	Namibia	0.625	0.353	99	0.466	84	0.187
121	Honduras	0.625	0.427	89	0.511	105	0.159
122	Kiribati	0.624	..	..	..	..	..
123	South Africa	0.619	..	..	0.49	94	0.057
124	Indonesia	0.617	0.504	79	0.505	100	0.095
125	Vanuatu	0.617	..	..	..	..	0.129
126	Kyrgyzstan	0.615	0.526	71	0.37	66	0.019

HDI rank		Human Development Index (HDI) Value	Inequality-adjusted HDI		Gender Inequality Index		Multidimensional Poverty Index
			Value	Rank	Value	Rank	
MEDIUM HUMAN DEVELOPMENT							
127	Tajikistan	0.607	0.5	81	0.347	61	0.068
128	Viet Nam	0.593	0.51	76	0.305	48	0.084
129	Nicaragua	0.589	0.427	88	0.506	101	0.128
130	Morocco	0.582	0.409	90	0.51	104	0.048
131	Guatemala	0.574	0.393	92	0.542	109	0.127
132	Iraq	0.573	..	..	0.579	117	0.059
133	Cape Verde	0.568	..	..	..	..	..
134	India	0.547	0.392	93	0.617	129	0.283
135	Ghana	0.541	0.367	96	0.598	122	0.144
136	Equatorial Guinea	0.537	..	..	..	..	..
137	Congo	0.533	0.367	97	0.628	132	0.208
138	Lao People's Democratic Republic	0.524	0.405	91	0.513	107	0.267
139	Cambodia	0.523	0.38	95	0.5	99	0.251
140	Swaziland	0.522	0.338	103	0.546	110	0.184
141	Bhutan	0.522	..	..	0.495	98	0.119
LOW HUMAN DEVELOPMENT							
142	Solomon Islands	0.51	..	..	..	..	..
143	Kenya	0.509	0.338	102	0.627	130	0.229
144	São Tomé and Príncipe	0.509	0.348	100	..	..	0.154
145	Pakistan	0.504	0.346	101	0.573	115	0.264
146	Bangladesh	0.5	0.363	98	0.55	112	0.292
147	Timor-Leste	0.495	0.332	105	..	..	0.36
148	Angola	0.486	..	..	..	..	0.452
149	Myanmar	0.483	..	..	0.492	96	0.154
150	Cameroon	0.482	0.321	107	0.639	134	0.287
151	Madagascar	0.48	0.332	104	..	..	0.357
152	Tanzania, United Republic of	0.466	0.332	106	0.59	119	0.367
153	Papua New Guinea	0.466	..	..	0.674	140	..
154	Yemen	0.462	0.312	108	0.769	146	0.283
155	Senegal	0.459	0.304	109	0.566	114	0.384
156	Nigeria	0.459	0.278	116	..	..	0.31
157	Nepal	0.458	0.301	111	0.558	113	0.35
158	Haiti	0.454	0.271	121	0.599	123	0.299
159	Mauritania	0.453	0.298	112	0.605	126	0.352
160	Lesotho	0.45	0.288	115	0.532	108	0.156
161	Uganda	0.446	0.296	113	0.577	116	0.367
162	Togo	0.435	0.289	114	0.602	124	0.284
163	Comoros	0.433	..	..	..	..	0.408
164	Zambia	0.43	0.303	110	0.627	131	0.328
165	Djibouti	0.43	0.275	118	..	..	0.139
166	Rwanda	0.429	0.276	117	0.453	82	0.426
167	Benin	0.427	0.274	119	0.634	133	0.412
168	Gambia	0.42	..	..	0.61	127	0.324
169	Sudan	0.408	..	..	0.611	128	..
170	Côte d'Ivoire	0.4	0.246	124	0.655	136	0.353
171	Malawi	0.4	0.272	120	0.594	120	0.381
172	Afghanistan	0.398	..	..	0.707	141	..
173	Zimbabwe	0.376	0.268	122	0.583	118	0.18
174	Ethiopia	0.363	0.247	123	..	..	0.562
175	Mali	0.359	..	..	0.712	143	0.558
176	Guinea-Bissau	0.353	0.207	129	..	..	..
177	Eritrea	0.349	..	..	..	..	..
178	Guinea	0.344	0.211	128	..	..	0.506
179	Central African Republic	0.343	0.204	130	0.669	138	0.512
180	Sierra Leone	0.336	0.196	131	0.662	137	0.439
181	Burkina Faso	0.331	0.215	126	0.596	121	0.536
182	Liberia	0.329	0.213	127	0.671	139	0.485
183	Chad	0.328	0.196	132	0.735	145	0.344
184	Mozambique	0.322	0.229	125	0.602	125	0.512
185	Burundi	0.316	..	..	0.478	89	0.53
186	Niger	0.295	0.195	133	0.724	144	0.642
187	Congo, Democratic Republic of the	0.286	0.172	134	0.71	142	0.393
World		0.682	0.525	—	0.492	—	—

(Continued from page 5.)

After examining the general country rankings by the HDI and its supplementary indices, additional information is available for each specific country under the Countries tab of the Human Development Reports Website. This includes numerical values of the HDI and supplementary indices and the detailed statistics from which they are calculated as well as additional demographic, social, and economic statistics.

Findings on Trends in Human Development

The Human Development Reports also provide many findings concerning trends over time in the dimensions, indicators, and composite HDI values across recent decades. These changes over time were the principal subject of the 2010 Human Development Report the subtitle of which was *The Real Wealth of Nations: Pathways to Human Development*. The summary chart of temporal paths over the four decades from 1970 to 2010 from the Report is reproduced nearby. It basically shows steady progress in the HDI across these decades among countries in the Very High Human Development quartile with increasing variability in the trends as one goes down the quartiles of human development. In addition, the most rapid increases in the temporal paths are exhibited by several countries in the medium HDI quartile, including Saudi Arabia, Oman, Russia, China, Indonesia, and Guatemala.

Comment

To complete this assessment of the HDI, let's return to the questions cited at the beginning of this review.

First, to what extent does the report address the long standing objectives of systematic reporting on social issues for the purpose of public enlightenment and policy guidance?

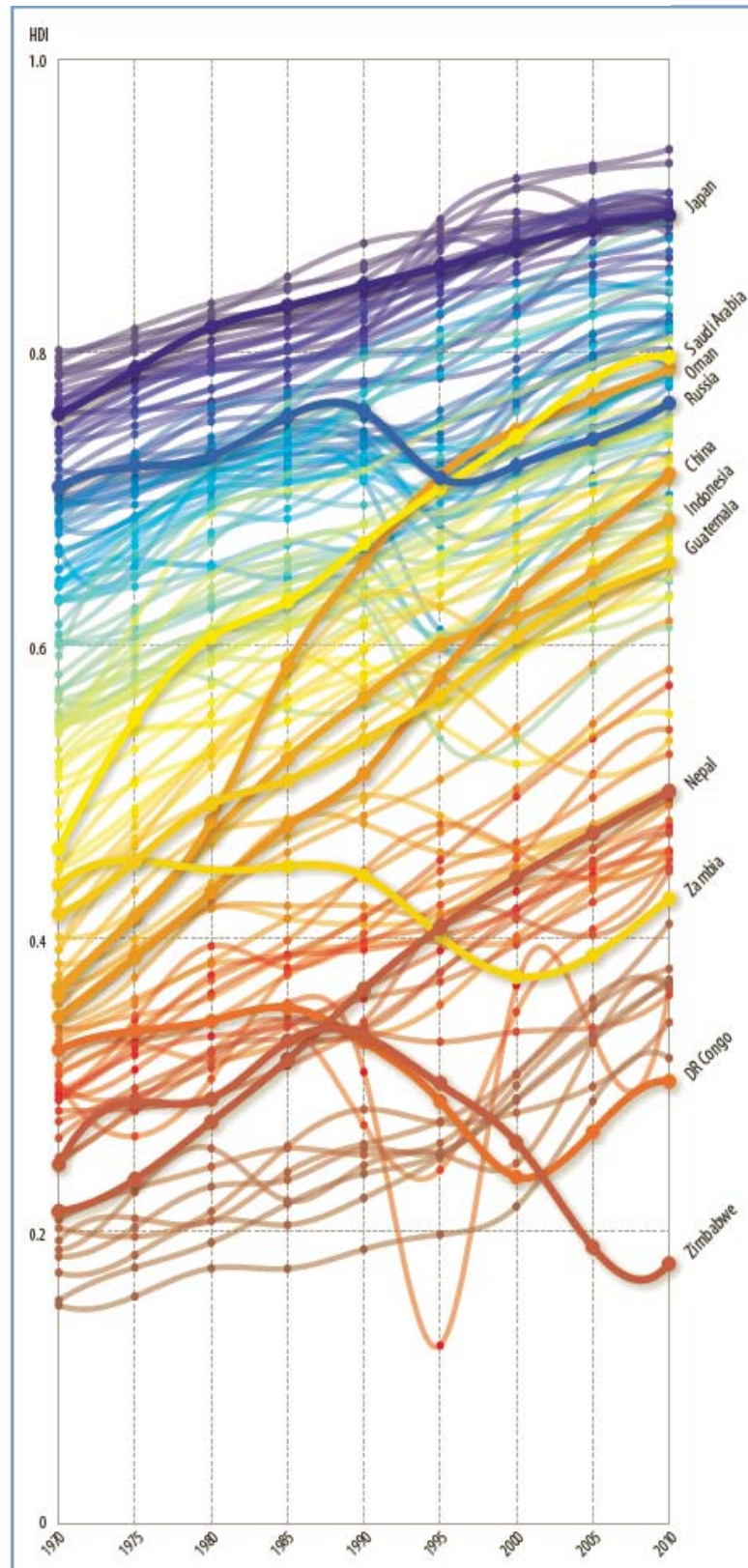
In creating the HDI, Mahbub ul Haq's explicit purpose to shift the focus of development economics from national income accounting to people centered policies. For this

(Continued on next page.)

FIGURE 2.1

Overall progress, significant variability

Worldwide trends in the Human Development Index, 1970-2010



Note: Results are for a sample of 135 countries based on the hybrid HDI described in box 2.1. The top movers (as defined in box 2.1) are Oman, China, Nepal, Indonesia, and Saudi Arabia; the bottom movers are DR Congo, Zambia and Zimbabwe.

Source: Hidalgo (2010) based on HDRO calculations using data from the HDRO database.

(Continued from previous page.)

purpose, Sen's capabilities and functionings conceptual approach was matched with Haq's goal of creating a single, composite index, similar to the conventional Gross Domestic Product in macroeconomics, that could capture the attention of the public and of policy makers. I cannot judge the extent to which the annual HDI reports have guided national and international human development policy. In her quote above from the Human Development Reports Mainpage, UNDP Administrator Helen Clark states that "... the human development approach has profoundly affected an entire generation of policy-makers and development specialists around the world..."

Perhaps just as important from a social reporting perspective, the HDI annual reports have received substantial public distribution and media attention and have helped to inform publics around the world. And, as the saying goes, imitation is the subtlest form of flattery—the development and production of the HDI has stimulated the development of many other composite social indicators at the international level (e.g., the Democracy Index, the Gender Parity Index, the Physical Quality-of-Life Index), the national level (e.g., the Australian Unity Wellbeing Index), and the sub-national level (e.g., the American Human Development Index at the state and regional levels). By this measure, the HDI certainly has been successful.

Other assessment questions: What aspects/domains of social life are reported? What social indicators? What are the trends? Are composite indices reported? The HDI, focused on the capabilities and functionings ideal that people should be able to live a long, healthy life with good education/skills that leads to economic well-being, leads to its three dimensions—life expectancy, education, and income—and the indicators thereof, as summarized above, and from those to the composite HDI and its related indices.

Regarding the HDI statistical formulas, recall that in the original version its three components are equally weighted in an arithmetic mean to form the composite index. As indicated, the modified formula used in the 2011 Report uses a geometric mean in order to make the HDI more sensitive to divergences in country performance on any one of the three dimensions. Nonetheless, the geometric mean also is an equally weighted average of the logarithmic values of the components of the index. The equal weighting procedure has been used by the HDI because of its simplicity, with little justification as a statistical estimator. This deficiency has been addressed by Hagerty and Land (2007), who showed both analytically and through numerical examples, that the equal weighting method is a minimax estimator in the sense that it minimizes extreme disagreements on unequal weighting schemes. In the absence of an unequal weighting scheme on which there is high consensus, this is a desirable statistical property. In recognition of the possible diversity of weights among individuals, and as has become a conventional practice in Web-based social reports, the Indices & Data page on the Human Development Reports Website has a Do It Yourself HDI tab—DIY HDI: Build Your Own Index—that allows viewers to reset the weights of the component dimensions of the HDI and recalculate the index values and rankings of the countries.

A final question: Is well-being/quality of life an organizing, or at least underlying, principle of the social report? The past four decades have seen huge amounts of new research on subjective well-being and social indicators and conceptualization thereof (see, e.g., Sirgy 2011 for a review). Accordingly, one might approach the formulation of the HDI today from conceptual perspectives other than Sen's capabilities approach. It is likely, nonetheless, that the three dimensions measured by the HDI nonetheless would play important role, especially given limitations on

statistical data for broad worldwide, international comparisons. Increasingly, however, new data sources relevant to the assessment of well-being at the national and sub-national levels are becoming widely available. This includes new survey data on subjective well-being. Accordingly, it is recommended that the UNDP Human Development Report Office maintain active participation in the international conferences of ISQOLS in order to make the case for the HDI and its related indices and to stay abreast of new conceptual, methodological, and data developments for the assessment of well-being and the quality of life.

In sum, the virtues of the Human Development Reports pertain to the application of a conceptual scheme that draws attention to dimensions of well-being that go beyond a country's Gross Domestic Product and that is simple enough in its indicator demands that the empirical calculation of the HDI can be so inclusive of countries around the world. As more data on other well-being dimensions become available for more countries, an objective of the Human Development Report Office should be to assess today's extensive body of well-being and social indicators research for possible refinements, revisions, and extensions of the HDI.

~ Kenneth C. Land

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The 11th ISQOLS Conference "Discovering New Frontiers in Quality of Life Research"

Venice, Italy, November 1 to 4, 2012

Dear Members of ISQOLS and readers of SINET,

As you may already know, our plans to hold the 11th ISQOLS conference in Lisbon failed unfortunately. Due to serious delays in the organization processes, ISQOLS felt impelled to withdraw from the agreement with our partners in Lisbon and regrettably to cancel the conference, which had already been announced in SINET and elsewhere.

The good news is, that we will have a 2012 conference though! I am delighted to announce the 11th Conference of the International Society for Quality of Life Studies (ISQOLS) to take place in Venice, Italy, from November 1 to 4, 2012. The general conference theme will be "Discovering New Frontiers in Quality of Life Research".

I am more than grateful that Filomena Maggino, President-Elect of ISQOLS and host of the beautiful and very successful ISQOLS conference 2009 in Florence, took the initiative to host the conference in Italy once more and agreed to act as the conference chair. The conference will take place at the unique premises of the "Ca' Foscari" - University in San Giobbe, where the Economics Department is housed. There is certainly no need to praise Venice as an extraordinary location and World Heritage, and I am very confident that the ISQOLS conference 2012, taking place in one of the most beautiful cities in Europe and the World, will become a special event and attract many quality of life researchers from all around the globe.

More information on the location, registration procedures, accommodations and other issues will be published soon at the conference website (www.aiquav.it/isqols2012/). A call for papers will be launched by mid-March.

Much looking forward to seeing many of you in Venice later this year!

With best wishes,
Heinz-Herbert Noll
President of ISQOLS

Call For Papers *Applied Research in Quality of Life*

*The Official Journal of
the International Society
for Quality-of-Life Studies*

The aim of this journal is to publish conceptual, methodological and empirical papers dealing with quality-of-life studies in the applied areas of the natural and social sciences. As the official journal of ISQOLS, it is designed to attract papers that have some direct implications for or impact on practical applications of research on the quality-of-life. We welcome papers crafted from inter-disciplinary, inter-professional and international perspectives. This research should guide decision making in a variety of professions, industries, nonprofit, and government sectors such as healthcare, travel and tourism, marketing, corporate management, community planning, social work, public administration, human resource management, among others. The goal is to help decision makers apply performance measures and outcome assessment techniques based on concepts such as well-being, human satisfaction, human development, happiness, wellness and quality of life. The Editorial Review Board is divided into specific sections indicating the broad scope of practice covered by the journal, and the section editors are distinguished scholars from many countries across the globe.

Authors interested in submitting manuscripts for publication should consult the website <http://ariq.edmgr.com>. Manuscripts should be directed to the relevant Section Editor of the Editorial Review Board. If an appropriate Section Editor can not be identified, direct the manuscript to the current Editor in Chief, Alex Michalos.

THE INTERNATIONAL SOCIETY FOR QUALITY-OF-LIFE STUDIES:

HEADQUARTERS AND
WWW HOMEPAGE

The International Society for Quality-of-Life Studies (ISQOLS) was formed in the mid-1990s. The objectives of ISQOLS are: 1) to stimulate interdisciplinary research in quality-of-life (QOL) studies within the managerial (policy), behavioral, social, medical, and environmental sciences; 2) to provide an organization which all academic, business, nonprofit, and government researchers who are interested in QOL studies can coordinate their efforts to advance the knowledge base and to create positive social change; and 3) to encourage closer cooperation among scholars engaged in QOL research to develop better theory, methods, measures, and intervention programs.

As reported in ISQOLS President H-H Noll's report, Denis Huschka recently has taken over the Executive Director and Treasurer for ISQOLS from Joe Sirgy, and the ISQOLS Central Office has moved from Blacksburg, Virginia, USA to Berlin, Germany. An update on the new office will be reported in the November 2011 issue of SINET.

The year 2012 membership fees are US\$75 for regular members and \$50 for students or retired persons. Anyone interested in knowing more about ISQOLS should contact Denis at the central office.

E-mail: isqols@vt.edu
Website: www.isqols.org

MEASURING THE WORLD'S WELL-BEING

A GLOBAL HANDBOOK OF WELL-BEING AND QUALITY OF LIFE

Well-being and quality of life are prominent goals in and for the new century. They are the prolongation of mankind's long-term struggle for progress into a new stage in the future. Since the beginning of human existence, people have been seeking better living conditions. Struggles of the past centuries were mainly on health (to prolong life), on wealth (to overcome poverty) and on democracy (to secure human rights). Now well-being and quality of life are more frequently than ever before on the agenda of societal thinking and planning. Therefore, time has come for a comprehensive global balance of this goal conception in our world.

Various aspects of our world society have been investigated in recent decades in different parts of the world from a perspective of the quality of societies. In the new century, the emerging goal of well-being and quality of life is assisted by social measurement, social indicators, and social monitoring. Bringing the different pieces of knowledge together in a consistent framework is the idea of this global handbook.

The main reason for the interest in the global world is the new quality of the world society. The earlier fragmentation into rather independent continents and nations has been overcome and a general interdependence has developed. In a certain sense, the world has come together. Therefore, the need for monitoring quality of life on earth is growing.

The preceding century was once described as the "The first measured century" (Caplow 2001) and this process of monitoring is still going on. Some approaches already have tried to keep the world in view. Examples of comprehensive worldwide approach-

es are well-known handbooks. They stem on the one side from international organizations (e.g., the World economic and social survey from the United Nations) and on the other side from scientific research institutions (e.g., the Handbook on International Poverty Research). There are moreover specialized worldwide approaches on the economy and various terms of the quality of societies.

The aim of the Global Handbook of Well-being and Quality of Life project is to bring this knowledge under the umbrella of well-being and quality of life together. The recommended methodological style is theoretical guidance with empirical foundation and a preference for representative data whenever possible from worldwide statistics. As far as this Handbook is concerned, the presentation of approaches should be performed by the original authors or research teams. If this is not possible, we will turn to the followers and newcomers in the research field. We also are producing some contributions from our own work.

The main parts of the Handbook are:

- There are some preconditions to quality of life research which are basically related to them: life expectation and health; peace, war and social conflicts; democracy and participation. If the conditions of a healthy life, peace and democracy are not fulfilled, the question of quality of life remains in the background. Therefore, we start with these topics.
- Fundamentally to the evaluation of societies is the division between objective and subjective: objective usually refers to what experts say and this may be

true, though people do not believe it. But often experts are wrong. Subjective refers to what people are feeling, and it can preferably be investigated in terms of representative surveys. Genuine objective approaches to quality of life work with social indicators; the main approaches are the Human Development Index (HDI), the Wellbeing-Index (WBI) and the Weighted Index of Social Progress (WISP). They contain rather different numbers of dimensions which range from three to twenty. Subjective indicators may be unidimensional and unipolar (like the satisfaction with life scale), multidimensional and unipolar (like the Australian Wellbeing-Index), and multidimensional and bipolar (like the Bradburn-Scale). There are many more of these indicators to measure the quality of society but according my knowledge these are the most developed. Only if they are brought into one context (for further relevant references, see Glatzer 2012), will they lead to a comprehensive picture.

- Global structural problems of well-being are related primarily to the question of whether economic growth improves the people's quality of life. This question has to be extensively studied, and it should be regarded also in respect to the different conditions in developed and developing countries. A critical point is worldwide poverty and its threat for people's well-being. With respect to the provision of mankind with goods and services, it should be recognized that the market economy is not the only institution of welfare production, moreover, private households, intermediate civil associations and state provisions are - at least in some regions - of comparable significance.
- A complex design like a world society must be considered in

subdimensions of well-being and quality of life. For humankind as a collective being, living alone or living together is an important question. As there are increasing trends in contemporary societies to live alone, this question will become crucial. Traditionally, we know there are many problem groups, some of which are large: from a life cycle perspective, these are especially children and elderly people. Another worldwide group are migrants, who are accompanying globalization.

- The spatial division of the world usually is divided into the continents, which are different from another, but also internally heterogeneous. The view of a continent is an analysis of its own.
- One component of globalization are the international actors, which are engaged in many fields to improve living conditions (UN, UNESCO, EC, ASEAN and so on). Often they engage themselves in social reporting with more or less accent on the quality of life and well-being but sometimes also on social cohesion and sustainability. The idea of the Handbook is to include a self-description of these institutions with respect to their goals and their monitoring.
- The range of topics will also include single countries and their quality of life. As the number of potential countries is rather high, a decision was made to always include the three most densely populated countries from each continent. These are examples from main actors in world politics, but, in principle, this list can be enlarged to many societies.
- The final part is related to fundamental questions of well-being and quality of life. Quality of life has a bias towards the positive side of life. Satisfaction and happiness, though the measurement scales have a zero, are, in their core, positive concepts. There are worries and pains which con-

stitute concepts on the negative side. And, from early studies, we know that the correlation between positive and negative well-being is not high. Hopes and fears are also dimensions which have to be regarded for people's well-being. Whether people are optimistic or pessimistic is part of their well-being, and whether the people of the world are looking optimistically into their future is one of their crucial characteristics.

When the idea for the Handbook took structures in my mind, I tried to find support. The ISQOLS Executive Committee discussed my first draft in Florence and voted with a single voice as "yes". From the ISQOLS chairperson (Bob Cummins) and the officer for publishing affairs (Laura Camfield) I got an official direction. The Springer Verlag - engaged through Joe Sirgy - offered a publishing contract. My university, Goethe-University Frankfurt am Main, gave me intellectual support and provided a research assistance position that was filled by Jennifer Gulyas. The selection of authors for certain chapters begun: some of the high competent authors, who agreed to participate, are Mathias Boes, Norbert Bradburn, Robert Cummins, Michael Dauderstaedt, Ed Diener, Richard Estes, Takashi Inoguchi, Ruut Veenhoven, Norbert F. Schneider & Frank Swiaczny and others. Also Alex Michalos and Wolfgang Zapf are in the author's boat. Of course we were looking especially for competent female researchers: up to now we have the agreement of Laura Camfield, Liz Eckermann, Gilda Farrell, Filomena Maggino and Valerie Moller. To find authors is not so easy because we often have a difficult no-answer problem. As a planner, you never know what no reply means: was my request rejected or is somebody still thinking about it? So we have to wait sometimes a long time or maybe forever. Because we have a few open chapters, I would like to invite colleagues who feel compe-

tent for global topics to tell me their interest.

During my work with the handbook, my knowledge level has improved and I feel that I missed two areas which are, in general, a deficit in quality of life research. These are the contribution of nature to the quality of life (woods, weather, water, soil) and the relevance of nutrition for the quality of life (hunger, eating styles). From the inequality perspective, it could be valuable also to study luxury and affluence instead of only the poor. This would mean also including the top life styles of the world.

Our goal is to create a balance of well-being and quality of life in a worldwide perspective in the long run. We are discussing structural problems of the world, for example the relationship between economic growth and happiness, and also the hiatus between developing and developed countries and the threat of poverty to the quality of life. We will include the continents and - because we cannot include all countries of all continents - have selected the big countries in each. Our analysis includes special dimensions in a worldwide view: the children, the elderly, and people living alone and together. We try to give a worldwide view from the three main dimensions of people's well-being: satisfaction and happiness, worries and pain, and hopes and fears.

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The main chapters in the handbook will be:

- Long Term Trends of World Development: People, Wealth, Democracy
- Monitoring Global Well-being: Objective and Subjective Measurement
- Structural Problems of Well-being
- Subdimensions of Well-being
- Well-being of Continents and World Regions
- Social Reporting of International Organizations
- Well-being Levels and Inequalities in Selected Nations
- Basic Dimensions of Global Well-being

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The Global Handbook Project in cooperation with:



IN RECOGNITION OF **WOLFGANG ZAPF'S** **75TH BIRTHDAY**



From Wolfgang Glatzer: The social indicators and quality of life-social network wishes Wolfgang Zapf the best to his 75th birthday, especially a nice celebration, a future life with an optimum of happiness and a minimum of worries and as much optimism as possible. As a famous person gets older, it is more and more difficult to tell something new about him. This is no doubt the case with Wolfgang Zapf. When I tried save this text on my computer, it was refused. The address was already taken for the contributions to the 70th birthday of Wolfgang. A lot is said about Wolfgang Zapf in various publications and not at least in the internet (Wikipedia).

He was born April 25 in Frankfurt in the year 1937 and he is now 75. As he would say, thank god. In between he had an extraordinary career with two main life events close together: in 1966 his marriage with Katrin, also an significant sociologist, and in 1968 he attained, as a young man, his professorship at Goethe university in Frankfurt. Then he went step by step onward to hold important scientific positions, he organized scientific institutions and he influenced scientific debates primarily about modernization and quality of life. In addition to rearing two children -

Peter and Hanna, he met a lot colleagues from all the continents and two of them join me in describing their meetings.

As a student working with Wolfgang Zapf, I looked into the university archives in Frankfurt and found that Wolfgang Zapf is documented there with his activities especially his seminars and their participants. Wolfgang Zapf was a Frankfurt student and wrote his diploma thesis with Theodor W. Adorno about lay theatre. After his diploma at Frankfurt, he attained the doctoral degree in Konstanz with the doctoral director Ralf Dahrendorf on the German elite. Early on, he received his first chair at the Goethe-university. According to the archive collections, he offered very different seminar topics from modernization through the construction of sociological theories (Stinchcombe) to . In the summer term 1970/71, he offered a social indicators seminar (together with Karl Ulrich Mayer), the entry of the social indicators movement into Germany. I contributed papers to several seminars and was strongly motivated because Wolfgang never said anything negative about my work. On the other hand, he never gave a top mark to students (which changed a little bit later in his career). Frankfurt was at this time, in addition to Berlin, the center of the student movement, in which most students participated. Wolfgang did not like the student revolt of 1968 with their Marxist references, but he remained tolerant and cool in the debates. He favoured an enlightened modernization approach, which was at that time not on the students' agenda, even though it later became reality.

From Ken Land: I met Wolfgang Zapf in the year 1978. I was asked to attend a conference at the UNESCO Office in Paris, France on the topic of social indicators. Wolfgang Zapf presented at this conference on the system of social indicators for Germany. It was my first time for me to meet Wolfgang. Another sociologist participating in the conference was Johann Galtung, the well-known sociological methodologist from Norway. Galtung, who at the time was quite committed to a Marxist analysis of society and approach to social indicators proceeded to mercilessly attack Wolfgang Zapf for the system that he had developed with his colleagues. He was quite persistent in his criticism of Zapf. Wolfgang held this cool and he was stoic in his responses. His position impressed me by questioning Marxism and

emphasizing a modernized modernization concept. The course of world society in the years after 1980 later supported his view.

From Valerie Moller: My first meeting with Wolfgang Zapf was virtual – through his written work on social reporting that was published in Social Indicators Research in the 1980s. Professor Zapf introduced me to a quality-of-life concept that was accessible and also made good sense when applied to the South African situation under apartheid; the oppressed black majority fell into his 'deprived' minority welfare category, while only the privileged few scored high on subjective well-being. Zapf's early SIR articles with my heavily pencilled underlines and margin notes are still on my bookshelf today. But I only met the European giant of the social indicators movement work in person in 2001. Professor Zapf invited me to participate in a workshop he convened at the Wissenschaftszentrum Berlin to plan collaboration on the Euromodule project. The man whose work I admired came across as a master at promoting his colleagues and minions and letting them shine, while still holding the strings that made the enterprise work smoothly. It was one of the most enjoyable, collegial and also efficient meetings in which I've ever participated. And Professor Zapf's hospitality was most generous. As I was stranded in Berlin for several days owing to the collapse of Swissair, he kindly invited to join the post-workshop evaluation of the meeting along with his staff. I felt welcome, as if I were a regular member of his research team. Having benefitted from Zapf's mentorship, we are busy nurturing the next generations of social indicator scholars to follow in Professor Zapf's large footsteps – ones that will be difficult to fill.

These are examples from Wolfgang Zapf's scientific life around 1970, 1980 and 2000. He always had a worldwide orientation and was a tolerant supporter of many younger scientists. He is now a Methusalem of the social indicators research. He should enjoy this role in the future as far as possible.

SINET WORLD WIDE WEB HOMEPAGE

SINET has a homepage entry on the World Wide Web. It is located on the homepage of the Department of Sociology at Duke University and thus can be accessed by clicking on Department Publications on the address of that page, namely, <http://www.soc.duke.edu> or by typing in the full address <http://www.soc.duke.edu/resources/sinet/index.html>. The homepage for SINET contains a description of the Contents of the Current Issue as well as of Previous Issues. In addition, it has Subscription Information, Editorial Information, Issue-Related Links, and a link to the homepage of ISQOLS, the International Society for Quality-of-Life Studies. The Issue-Related Links button has links to World Wide Web locations of data for the construction, study, and analysis of social and quality-of-life indicators that have been identified in previous issues of SINET. When you are surfing the Web, surf on in to our homepage.

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