



# MEASURING HUMAN DEVELOPMENT

## A PRIMER

GUIDELINES AND TOOLS FOR  
STATISTICAL RESEARCH, ANALYSIS AND ADVOCACY

An abstract graphic consisting of several overlapping circles in red, blue, and yellow, creating a complex, layered pattern. The circles are of varying sizes and are positioned to create a sense of depth and movement.

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**COVER ARTWORK:**

The cover image for this primer has been designed to reflect both the standard principles upon which rigorous measurement of human development depends, and the more innovative tools and out-of-the-box thinking that can be tapped for research, analysis and advocacy of human development issues. The spiral pattern suggests the cyclical nature of evidence-based policy-making.

**POSTER ARTWORK:**

The poster series on inequality featured throughout this primer was conceived by Tom Geismar and prepared by AIGA, the professional association for design, as part of the launch strategy of the 2005 global Human Development Report.

## FOREWORD

The human development approach represents a simple yet powerful idea: putting people at the centre of development. It is about enlarging people's choices and freedoms to live a long and healthy life, have access to knowledge and a decent standard of living, and participate in communities with dignity and self-respect.

Since the human development approach was introduced by the first global Human Development Report in 1990, more than 600 regional, national and sub-national human development reports (HDRs) have been launched by 143 countries. These reports are dynamic advocacy tools created through a process of active engagement within countries and across regions. Taking on cutting-edge issues, and articulating people's priorities, these reports are seen as important sources of innovation.

Sound statistical analysis provides the foundation for all work supported by the United Nations Development Programme (UNDP), the UN family and our partners. It is what allows us to identify and respond to local development needs, to advocate for change, and to track our progress as we work to help people build a better life.

*Measuring Human Development: A Primer* offers a timely set of guidelines and tools to support empirically based research, analysis and advocacy, drawing on the combined experience of leading development scholars, statisticians and policy makers from around the globe. As such, this primer complements the set of materials already made available to the human development community, including the HDR Network and the HDR Statistics Network, and the HDR Toolkit, Timeline and thematic guidance notes.

The primer is intended to strengthen the efforts of HDR teams, as well as other practitioners working together to achieve the Millennium Development Goals (MDGs), human rights and broader human development objectives.

I hope you find the primer useful and wish you every success in our common efforts to fight poverty and to enlarge people's choices and freedoms.



Kemal Derviş  
Administrator, UNDP

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*The opinions expressed on the following pages are those of the authors and do not reflect the institutional positions of UNDP.*

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Kevin Watkins  
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# HUMAN DEVELOPMENT REPORT RESOURCES

The Human Development Report Office has produced a number of tools to support the HDR process. They are listed here, along with the reports mentioned in this primer. The tools and most of the HDRs produced to date are available on the office's easy-to-navigate website at <http://hdr.undp.org>. It includes a special section called the NHDR workspace, which is devoted to regional, national and sub-national HDRs.

## General Resources

UNDP Corporate Policy on NHDRs

HDR Toolkit

HDR Timeline

Minimum Standards

Support Package for HDR Focal Points

*Issues, Innovation, Impact: How Human Development Reports Influence Change  
HD Insights*

Knowledge Networks: HDR-Net and HDR Stats-Net

*Environment Thematic Guidance Note*

*Gender Thematic Guidance Note*

*Conflict Prevention Thematic Guidance Note*

*HIV/AIDS and Human Development Thematic Guidance Note*

*The Human Security Framework and National Human Development Reports*

*Decentralization and National Human Development Reports*

## Global Reports

Human Development Report 1990: *Concept and measurement of human development*

Human Development Report 1991: *Financing Human Development*

Human Development Report 1993: *People's Participation*

Human Development Report 1994: *New dimensions of human security*

Human Development Report 1995: *Gender and human development*

Human Development Report 1996: *Economic growth and human development*

Human Development Report 1997: *Human Development to Eradicate Poverty*

Human Development Report 1999: *Globalization with a Human Face*

Human Development Report 2005: *International cooperation at a crossroads: Aid, trade and security in an unequal world*

Human Development Report 2006: *Beyond scarcity: Power, poverty and the global water crisis*

## Regional Reports

2003 Arab States: *Building a Knowledge Society*

2003 Report on the Roma: *Avoiding the Dependency Trap*

1999 South Asia: *The Crisis of Governance*

2001 South Asia: *Globalization and Human Development*

2002 South Asia: *Agriculture and Rural Development*

## National Reports

- 2004 Afghanistan: *Security with a Human Face*
- 2002 Albania: *Challenges of Local Governance and Regional Development*
- 2005 Albania: *Pro-Poor and Pro-Woman Policies: Operationalizing the MDGs in Albania*
- 2002 Argentina: *Contributions to Human Development in Argentina*
- 2005 Argentina: *Argentina post crisis: a time of opportunities*
- 1996 Armenia: *Poverty*
- 2003 Bolivia: *Gender*
- 2004 Bolivia: *Bolivia's Potential*
- 2005 Brazil: *Racism, poverty and violence*
- 1998 Cambodia: *Women's Contribution to Development*
- 2002 Chile: *We the Chileans: A cultural challenge*
- 2002 China: *Making Green Development a Choice*
- 2005 China: *Towards Human Development with Equity*
- 2005 Costa Rica: *Overcoming Fear: Citizen (In)Security and Human Development in Costa Rica*
- 2004 Egypt: *Choosing Decentralization for Good Governance (plus seven sub-national governorate reports)*
- 2005 Gabon: *External Debt and HD*
- 1997 Gambia: *General Human Development Report*
- 2005 Guatemala: *Ethnic and Cultural Diversity: Citizenship in a plural state*
- 2004 Indonesia: *The Economics of Democracy: Financing Human Development in Indonesia*
- 2004 Jordan: *Building sustainable livelihoods*
- 2000 Kazakhstan: *Fighting Poverty for a Better Future*
- 1999 Kenya: *Gender and Human Development*
- 2003 Latvia: *Human Security and Human Development*
- 2006 Liberia: *Building and Mobilizing Capacities for Reconstruction and Development*
- 2001 Macedonia: *Social Exclusion and Human Insecurity in the FYR Macedonia*
- 2006 Moldova: *Quality of Economic Growth and Its Impact on Human Development*
- 2004 Mexico: *The Local Human Development Challenge*
- 1997 Namibia: *General Human Development Report*
- 2004 Nepal: *Empowerment and Poverty Reduction*
- 1998 Nigeria: *Poverty: Towards a Holistic Sustainable Development Framework*
- 2004 Nigeria: *HIV/AIDS: A Challenge to Sustainable Human Development*
- 1997 Philippines: *Women and Gender in Development*
- 2007 Rwanda: *Turning Vision 2020 Into Reality: From Recovery to Sustainable Human Development*
- 2003 South Africa: *The Challenge of Sustainable Development*
- 2002 Tanzania: *The Poverty and Human Development Report*
- 2005 Tanzania: *The Poverty and Human Development Report*
- 2006 Timor-Leste: *The Path Out of Poverty*
- 2002 Uganda: *The Challenge of HIV/AIDS: Maintaining the Momentum of Success*
- 2005 Uganda: *Linking Environment to Human Development: A Deliberate Choice*
- 1999 Venezuela: *Public Investment, Human Development and Decentralization*

## Sub-national Reports

- 2005 Chhattisgarh (India): *Human Development Report*
- 2004 West Bengal (India): *Human Development Report*

## ACRONYMS

ARV	Antiretroviral
CEDAW	Convention on the Elimination of All Forms of Discrimination against Women
DAC	Development Assistance Committee
DOTS	Directly observed treatment short course
DPT	Diphtheria, pertussis and tetanus
ECLAC	Economic Commission for Latin America and the Caribbean
ESCAP	Economic and Social Commission for Asia and the Pacific
ESCWA	Economic and Social Commission for West Asia
FAO	Food and Agriculture Organization
GDI	Gender-related development index
GDP	Gross domestic product
GEM	Gender empowerment measure
GIS	Geographic information system
HDI	Human development index
HDR	Human development report
HDR-Net	HDR Network
HDRStats-Net	HDR Statistics Network
HIPC	Heavily Indebted Poor Countries Initiative
HPI	Human poverty index
ILO	International Labour Organization
ISCED	International Standard Classification of Education
ISCO-88	International Standard Classification of Occupations
ITU	International Telecommunication Union
LDC	Least developed country
MDGs	Millennium Development Goals
NGO	Non-governmental organization
NHDR	National human development report
ODA	Official development assistance
OECD	Organisation for Economic Co-operation and Development
PPA	Participatory poverty assessment
PPP	Purchasing power parity
PRSP	Poverty reduction strategy paper
UBA	Unmet basic needs approach
UNAIDS	Joint UN Programme on HIV/AIDS

## ACRONYMS

UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNHCR	United Nations High Commission for Refugees
UNICEF	United Nations Children's Fund
UNIDO	United Nations Office on Drugs and Crime
USAID	US Agency for International Development
WHO	World Health Organization



# INTRODUCTION

## WHY MEASURE HUMAN DEVELOPMENT?

As Aristotle argued, “Wealth is evidently not the good we are seeking; for it is merely useful and for the sake of something else.” That “something else” is the opportunity of people to realize their potential as human beings. Real opportunity is about having real choices—the choices that come with a sufficient income, an education, good health and living in a country that is not governed by tyranny.

—2006 global HDR

**H**uman development is about the realization of human potential. It is about what people can do and become—their capabilities—and about the freedom they have to exercise real choices in their lives. This framework is based on what economist and Nobel laureate Amartya Sen calls the capabilities and functionings approach. Not only is it important to achieve more “functionings,” but it is essential for people to have the “capabilities” or the freedom to achieve these.

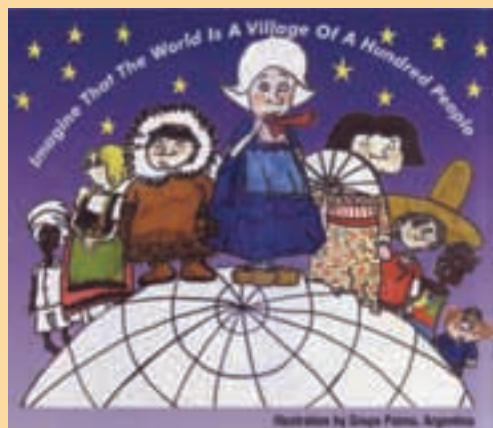
Critical to progress in human development is the ability to measure and closely monitor it. The capability approach emphasizes what a person can do and not just what she or he can purchase as the metric of development. The collection of human development data lends itself to evidence-based policy-making that helps reduce the forms of social, political and economic exclusion that otherwise keep people from realizing their capabilities.

Evidence-based policy-making may be defined as using statistics and other sources of information systematically to highlight issues (see box 0.1), inform programme design and policy choice, forecast the future, monitor policy implementation and evaluate policy

BOX  
0.1

### A VILLAGE OF 100 PEOPLE

Peace Child International used statistics in a striking way to illustrate global disparities.



There are 52 women and 48 men, 37 Asians, 21 Europeans, 8 Africans and 14 from the Americas. Only 30 are white, 69 are brown-skinned, 11 of the inhabitants live in an affluent area of the village and about 70 in poorer districts. The other 7 live in a neighbourhood that is partially developed.

The average income per person is \$4,000 a year but in reality nearly half of the inhabitants survive on less than \$2 per day. The villagers, two thirds of whom are women, are illiterate. Of the 19 people under 20 years of age, 15% live in poorer districts and many of them are looking for jobs that do not exist.

60 people own a computer but only two of them have access to the Internet. More than half the population of the village have never made or received a telephone call.

In the affluent districts, people live for nearly 78 years; in poorer areas 64 years and in the poorest neighbourhoods only 52 years. Inadequate housing, malnutrition and a lack of access to safe water, sanitation, health care, adequate housing, education and work all combine to create a higher incidence of fatal diseases to create harsher conditions and shorter life spans in the poor districts.

Adapted from: Nelson Ales-Carera, 14, Scotland  
with some help from The Millennium Report by Kofi Annan, Secretary General  
of the United Nations

Source: Peace Child International 2002.

Mahatma Gandhi once commented that “the difference between what we do and what we are capable of doing would suffice to solve most of the world’s problems.”

2006 GLOBAL HUMAN DEVELOPMENT REPORT

impact. Understanding the importance of evidence-based analysis and using it to measure human development is critical not only for policy makers, but also for civil society at large. In the absence of this evidence, other forces fill the vacuum. These include power-

ful and sectional interests, corruption, political ideology and arbitrary practices based on anecdote. Evidence-based policy-making is the only form of policy-making that is fully consistent with a transparent and accountable democratic political process.

The human development framework underpins and guides the analysis presented in the global Human Development Report, which was founded by the visionary economist Mahbub ul Haq and has been published annually since 1990. In 1992, the first national HDR was published, essentially mirroring the global publication in approach, but adapted to a national context. Since then, over 600 sub-national, national and regional HDRs have been disseminated in more than 140 countries and regions.

The global HDR has created and developed four main composite human development indices to assess measurable dimensions of human development. These are the human development index (HDI), the human poverty index (HPI), the gender-related development index (GDI) and the gender empowerment measure (GEM). The indices help to focus attention on critical issues, and incite debate and further research. Many national HDR teams have not only adapted the indices to national needs, but have also come up with innovative methodologies and indicators



Tom Geismar, AIGA [www.aiga.org/inequality-matters](http://www.aiga.org/inequality-matters)

to measure local human development inequities. Complementing composite indicators with other forms of statistical analysis, which many HDRs do, helps to strengthen the messages of reports.

## What Does the Human Development Report Process Offer?

Evidence of need, the illustration of deprivation and the demonstration of achievement are all important parts of the struggle for human development. The most important objective of an HDR is to influence and advocate policy so that deprivation is eliminated.

As is the case in the global HDRs—which have explored themes including human security, technology, human rights, culture, democratic governance and access to water—national HDRs analyse varying aspects of human development by choosing themes that are distinct, timely and locally relevant. Many national HDR teams employ participatory research methodologies such as perception surveys, along with innovative analysis to capture as many aspects of human development as are widely perceived to be valuable. HDR analysis has revealed inequalities otherwise concealed by national figures, captured the effects of short-term policy changes and contributed to stronger definitions of national priorities.

HDRs are meant to be more than just publications. They serve as processes that enlarge capacities, bring diverse stakeholders together and focus attention on policies to improve people's lives. In 2001, UNDP issued its Corporate Policy on NHDRs, which draws on the experiences of HDR teams that have

produced reports across the globe. Together, they formulated six core principles that characterize excellence (see box 0.2).

Generally, the hallmark of an HDR is its quest for public debate on national human development challenges and their magnitude, and further research and advocacy for policies to eliminate deprivation, especially among the most disadvantaged. Statistics and solid evidence help fulfil these objectives. HDRs often contain data that have not been previously published. They can help meet the demand for the collection, analysis and dissemination of statistics needed to monitor the Millennium Development Goals (MDGs) and other human development objectives. In disaggregating statistics, HDRs highlight the distribution of human development so that disparities can be identified for immediate policy action.

The quality of data available to HDR teams varies with local capacity, the political situation in a country, its attention to data collection and harmonization, and the accuracy and timeliness of the questions used to collect data. Many reports supplement their findings with qualitative data collection and analysis, which helps to validate findings and puts a compelling human face on the numbers. The key human development principles of participation, transparency and accountability should be applied to all aspects of data collection, analysis and dissemination.

## SIX CORE PRINCIPLES THAT GOVERN HDRs

An integral part of the HDR process is its ability to bring different, sometimes dissonant, groups together, to enhance local capacities and to support the formulation of policies that reflect the needs of diverse stakeholders. HDR report teams use the following corporate policy guidelines to produce high-quality reports that aim to achieve:

**National/regional ownership** through a process that draws on national/regional actors and capabilities throughout the preparation, yielding a product firmly grounded in the country's past and existing development plans. *Ensures relevance.*

**Participatory and inclusive preparation** that gathers together diverse actors as active partners. These include government, non-governmental, academic and non-academic players, both men and women, different ethnic groups, and so on. *Builds consensus.*

**Independence of analysis** through objective assessments based on reliable analysis and data. Reports are not consensus documents; they are independent publications in which the authors take ultimate responsibility for the points of view. *Generates respect.*

**Quality of analysis** that centres on people and makes global, regional and local connections. It uses quantitative and qualitative data to support policy arguments, and to measure and monitor human advances. *Promotes human development strategies.*

**Flexibility and creativity in presentation** through attractive visuals, fluid language and a creative style that will engage the interest of the target audience. *Maximizes impact.*

**Sustained follow up** that generates awareness and dialogue, and influences national development actions. *Makes the report's voice heard.*

Source: *Issues, Innovation, Impact: How Human Development Reports Influence Change.*

## The Purpose of This Primer

This primer on measuring human development is intended as a reference tool that provides guidance on statistical principles for producing evidence-based policy recommendations and quality HDRs. HDR teams and other users may employ it as a general reference, and/or refer to key issues most relevant to their needs.

A detailed discussion on core statistical principles related to data collection and analysis opens the primer, followed by an examination of innovative ways to measure various dimensions of human development. The

primer concludes with suggestions on how to advocate for change using various instruments to communicate and disseminate the results of analysis and research. While the primer describes the human development indices typically found in the global HDR, the emphasis is on using national data to measure human development. References to some of the pitfalls in statistical analysis are accompanied by descriptions of ways to address them. Rounding off each chapter are country illustrations, checklists, tools and resources.

BOX  
0.3

### THE HUMAN DEVELOPMENT REPORT NETWORKS

The global **HDR Network** (HDR-Net) is a dynamic forum for professional knowledge sharing and learning on human development issues. To delve more deeply into statistical issues, and to draw more widely on the pioneering research of the larger social science and statistics communities, the Human Development Report Office created the **HDR Statistics Network** (HDRStats-Net). It is a more focused expert network that provides a specialized forum for measurement discussions.

HDRStats-Net covers technical discussions related to composite indices, data collection, and disparities between national and international data, among other issues. This community consists of over 800 global members from national statistics offices, academia, regional statistics commissions and members of the UN family.

Source: NHDR Workspace.

The primer complements a number of other initiatives from UNDP's Human Development Report Office, such as the HDR Toolkit (which provides guidance on achieving the six core principles), the HDR Networks (HDR-Net and HDRStats-Net—see box 0.3) and the HDR Timeline. All of these are available online (<http://hdr.undp.org/nhdr/>).

UNDP has produced complementary resources such as the Bureau of Development Policy's *Indicators for Policy Management* (a United Nations Development Group project), the Regional Bureau of Europe and the CIS' *Tracking Human Development: The Use of Statistics in Monitoring Social Conditions*, the Virtual School of the Regional Bureau for Latin America and the Caribbean (Escuela Virtual, Programa Regional para América Latina y Caribe, PNUD, [www.escuela.pnud.org/public/index.php](http://www.escuela.pnud.org/public/index.php)) and the online courses on human development done by UNDP's Learning Resource Centre (<http://learning.undp.org/>), among others.

International statistical capacity development efforts include the 2004 Marrakech Action Plan for Statistics, Paris 21, and the work undertaken by the United Nations Statistics Division and other international data agencies. Readers are encouraged to take advantage of all these resources in the pursuit of high quality, compelling reports that can contribute to policies advancing human development.