Slide 1

Annex S

SOCIAL WATCH PHILIPPINES

DEVELOPING INDICES FOR MONITORING SOCIAL DEVELOPMENT:
THE QUALITY OF LIFE INDEX (QLI)/
BASIC CAPABILITES INDEX (BCI)

Rene Raya
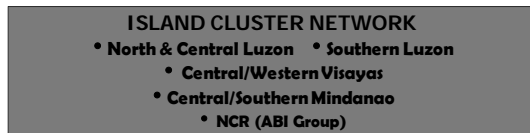**AER/SWP**

November 2010

Slide 2

Presentation Outline

1. About Social Watch
2. Quality of Life (QLI) Main Features
3. Developing QLI (QLI 1991-2003)
4. From QLI to BCI
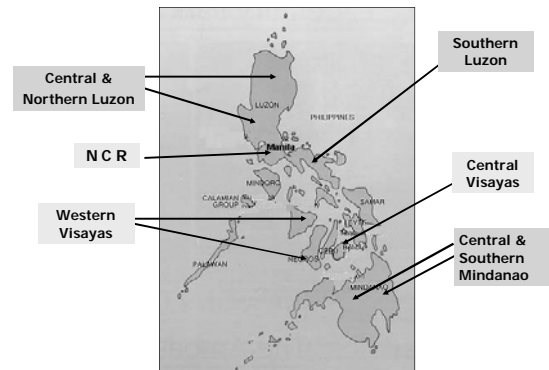5. Next Initiative on QLI/BCI - Ongoing

Slide 3

SOCIAL WATCH

Philippines (SWP)

☐ **National network, organized in 1997**

SWP
Convenors and a Network of Development NGOs

ISLAND CLUSTER NETWORK
• **North & Central Luzon**   • **Southern Luzon**
• **Central/Western Visayas**
• **Central/Southern Mindanao**
• **NCR (ABI Group)**

Slide 4

SOCIAL WATCH

Philippines (SWP)

Central & Northern Luzon

Southern Luzon

N C R

Central Visayas

Western Visayas

Central & Southern Mindanao

Social Watch Programs and Activities

- **Research, Information and Book Publication**
- **Monitoring of Social Development and the MDGs**
  Including developing monitoring tools
- **Advocacy Engagemsent –** International, Regional, National and Local
- **Financing for Development**
  - Alternative Budget Advocacy
  - Official Development Assistance
- **Partnership and Coalition-Building**
- **Social Mobilizations and Campaigns**

In the Philippines,

Four Volumes published since 2001; the 5th came out in Sept 2010

Operationalizing the Quality of Life Index (QLI)

AER conceptualized and piloted the QLI

SWP operationalized its application…

Quality of Life Index or QLI

QLI is an alternative measure of PEOPLE'S WELL-BEING

- *Based on capability-based measure proposed and popularized by Amartya Sen*
- *The measure assigns equal weights to three basic capabilities:*

1. 1) Capability to be well-nourished
2. 2) Capability for healthy and safe reproduction
3. 3) Capability to be educated & be knowledgeable

Quality of Life Index or QLI

QLI - an alternative measure of people's well-being

- ❖ A Pure Capability-Based Measure
- ❖ Easily generated using existing data
- ❖ Highly correlated with poverty measures
- ❖ Serves as an advocacy tool
- ❖ Effective for both national and local levels

Steps in Developing Quality of Life Index (QLI)
1st Initiative in developing QLI – Year 1998

A. Identifying the component indicators thru: Municipality random survey using a **Long list of Variables**

B. **Short listing** the component indicators thru: Regression analysis – how much can the indicators explain household income, assets owned, satisfaction & access to services

C. Generating Provincial QLI using different sets of component indicators using **Shorter List of Variables** to test sensitivity, availability and accessibility of data

D. Generating municipal QLI in select provinces to **validate component indicators**

> 1. **Cohort survival**
> 2. **Attended births**
> 3. **Nutrition**

Options in Generating QLI
--
1. What geographic level do we want the QLI
2. What data sources to use for the component indicators?
3. For what years do we generate QLI?
4. Validation techniques to use?

Level
QLI for Philippine Provinces
And for Cities and Municipalities within Provinces

Political & Administrative Division in the Philippines

❑ **17 Regions**

❑ 80 Provinces

❑ 138 Cities/1496 Municipalities

❑ Villages as the smallest administrative unit

Philippines

A sample region
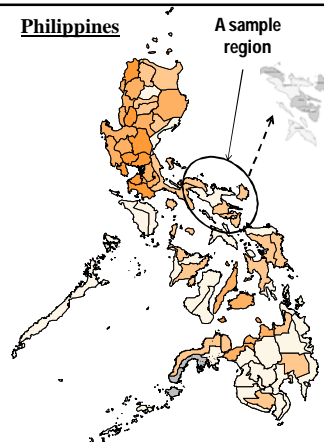
Identifying the Years

	90	91	92	93	94	95	96	97	98	99	00	01	02	03	04	05	06	07	08	09	10
Census	X									X											X
Income		x			X		x		x			x		X			x			X	
Health					X			x						X						X	
Education					x									X						X	
Nutrition	x			x			x		x					X						X	

Surveys

Income – Family Income and Expenditure Survey (FIES)
Health – Demographic and Health Survey (DHS)
Education – Functional Literacy, Education, Mass Media Survey (FLEMMS)
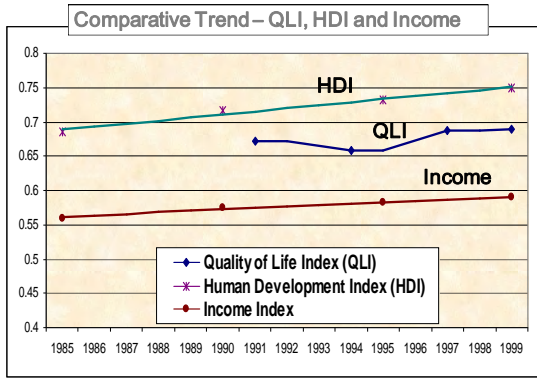Nutrition – National Nutrition Survey (NNS)

QUALITY OF LIFE INDEX 1991-2003
Action For Economic Reforms (AER)
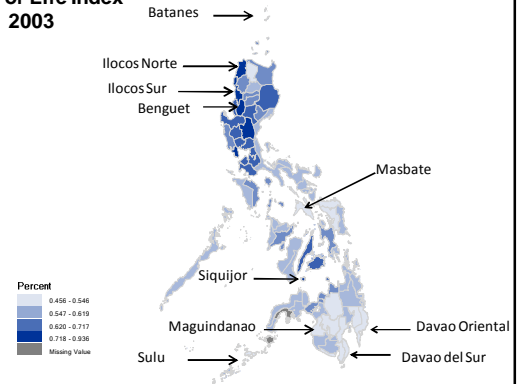
Top 20 Provinces in QLI

PROVINCE	QLI 1991	PROVINCE	QLI 1994	PROVINCE	QLI 1997	PROVINCE	QLI 1999	PROVINCE	QLI 2003
Batanes	0.902	Batanes	0.886	Batanes	0.901	Batanes	0.908	Batanes	0.936
Siquijor	0.842	Siquijor	0.865	Bulacan	0.866	Bataan	0.862	Siquijor	0.826
Pampanga	0.837	Bataan	0.859	Bataan	0.861	Siquijor	0.855	Bataan	0.821
Bulacan	0.836	Pampanga	0.851	Ilocos Norte	0.858	Cavite	0.844	Ilocos Norte	0.811
Bataan	0.831	Ilocos Norte	0.849	Siquijor	0.829	Ilocos Norte	0.828	Nueva Ecija	0.803
Cavite	0.785	Bulacan	0.830	Pangasinan	0.828	Pampanga	0.823	Ilocos Sur	0.798
Rizal	0.782	Tarlac	0.792	Batangas	0.822	Bulacan	0.820	Bulacan	0.795
Ilocos Norte	0.775	Laguna	0.785	Pampanga	0.819	Benguet	0.810	Pampanga	0.773
Tarlac	0.767	Rizal	0.776	La Union	0.801	Nueva Ecija	0.803	Batangas	0.771
La Union	0.759	Cavite	0.766	Rizal	0.799	Batangas	0.802	Benguet	0.738
Laguna	0.753	Nueva Ecija	0.749	Laguna	0.790	Laguna	0.793	Pangasinan	0.736
Zambales	0.753	Batangas	0.735	Cavite	0.782	Ilocos Sur	0.784	Camiguin	0.735
Benguet	0.732	Cebu	0.735	Tarlac	0.779	Camiguin	0.783	Laguna	0.735
Pangasinan	0.724	Pangasinan	0.717	Zambales	0.758	Pangasinan	0.774	Rizal	0.733
Camiguin	0.721	La Union	0.713	Ilocos Sur	0.755	Rizal	0.771	Cavite	0.732
Batangas	0.717	Benguet	0.702	Benguet	0.751	La Union	0.762	Isabela	0.722
Nueva Ecija	0.713	Ilocos Sur	0.682	Camiguin	0.751	Tarlac	0.760	La Union	0.721
Ilocos Sur	0.685	Camiguin	0.681	Cebu	0.739	Zambales	0.750	Tarlac	0.717
Cebu	0.681	Zambales	0.677	Nueva Ecija	0.731	Cebu	0.748	Tawi-tawi	0.711
Mt. Province	0.673	Mt. Province	0.674	Ifugao	0.725	Isabela	0.743	Nueva Viz.	0.709

*Common Provinces

Provincial Quality of Life

Comparative Trend – QLI, HDI and Income

Legend: Quality of Life Index (QLI), Human Development Index (HDI), Income Index

---

Quality of Life Index 2003

Labels: Batanes, Ilocos Norte, Ilocos Sur, Benguet, Masbate, Siquijor, Maguindanao, Sulu, Davao Oriental, Davao del Sur

Percent
0.456 - 0.546
0.547 - 0.619
0.620 - 0.717
0.718 - 0.936
Missing Value

QLI and HDI Correlation Matrix

	HDI	Life Ex-pectancy	Literacy Rate	Enrolment Rates	Per Cap. Income
QLI	0.72**	0.49**	0.51**	0.52**	0.68**
Under-5 Nutrition	0.30**	0.09	0.07	0.13	0.41**
Attended Births	0.45**	0.26*	0.28*	0.38**	0.49**
Elem. Cohort Survival	0.90**	0.74**	0.78**	0.64**	0.69**

Quality of Life Index 2003   **Human Development Index 2003**

Percent
- 0.456 - 0.546
- 0.547 - 0.619
- 0.620 - 0.717
- 0.718 - 0.936
- Missing Value

•Top 15 Provinces with Highest HDI Scores and Highest Household Income Levels (14 common). Similarly, bottom 15 Provinces – 9 common with HDI and 5 common with Household Income.

Note: the boundaries and the names shown and the designations used on these maps do not imply official endorsement or acceptance by the United Nations

QLI of Albay Province by Municipalities

Tiwi
Malinao
Polangui
Malilipot
Ligao
Manito

Total
- 54.82 - 58.96
- 58.97 - 63.11
- 63.12 - 67.26
- 67.27 - 71.41
- 71.42 - 75.57
- Missing Value
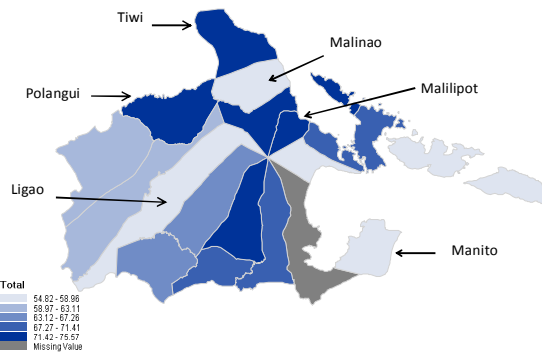
Quality of Life Index 2005
Negros Oriental: Cities and Municipalities

Valencia
Manjuyod
Amlan
Tayasan
Dauin
Vallerhermoso

Total
- 67.58 - 72.63
- 72.64 - 77.69
- 77.70 - 82.75
- 82.76 - 87.81
- 87.82 - 92.87
- Missing Value
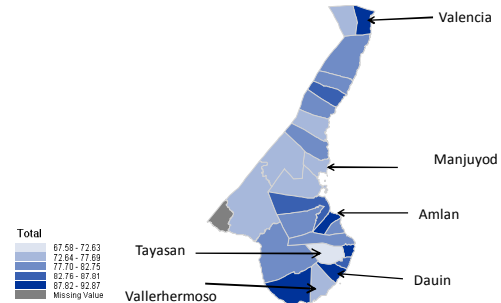
From QLI to the Global BCI

Social Watch International adopted the QLI for its Global Monitoring of social development and the MDGs

➔ **QLI** to

Basic Capabilities Index (BCI)

A measure of basic capabilities essential for social development:

1) Under 5 mortality rate
2) Births attended by skilled health personnel
3) Children reaching 5th grade

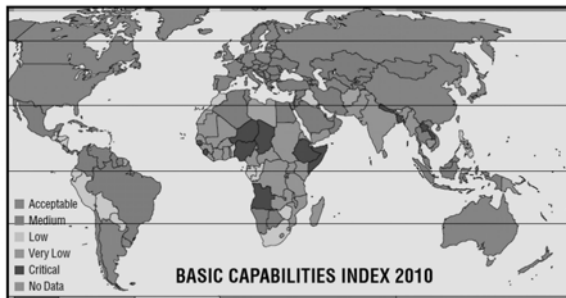Noted that QLI/BCI was highly correlated with other dev't indicators & most countries have available data.

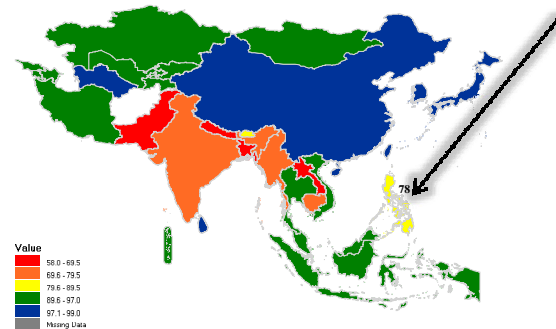## QLI/BCI Correlates strongly…

Key Development Indicators

	SPEARMAN RANK CORRELATION COEFFICIENT[11]
Social Watch ranking according to countries' average final situation by thematic area	0.93
Reproductive health	0.89
Education	0.84
Information, science & technology	0.82
Morbidity & mortality	0.77
Food security	0.75
Water & sanitation	0.73
Public expenditure	0.48

	PEARSON LINEAR CORRELATION COEFFICIENT
HDI 2003 (value)	0.90
HPI (value)	-0.80
International Poverty Line	-0.66
GDI per capita (2001)	0.62

INDICATORS BY AREA	PEARSON'S LINEAR CORRELATION COEFFICIENT[12]
HEALTH	
Under-five mortality rate	-0.85
Infant mortality rate	-0.85
% children immunised against polio	0.71
% children immunised against DPT	0.71
% children immunised against measles	0.68
% children immunised against TB	0.62
REPRODUCTIVE HEALTH	
% births attended by skilled health personnel	0.95
Maternal mortality rate	-0.84
Use of contraceptives	0.72
Prenatal health care	0.71
EDUCATION	
% children reaching 5th grade	0.85
Literacy rate (15-24 year olds)	-0.77
Enrolment in primary school	0.64

BASIC CAPABILITIES INDEX 2010

Acceptable
Medium
Low
Very Low
Critical
No Data

Basic Capabilities Index (BCI), ASIA, 2010

Value
58.0 - 69.5
69.6 - 79.5
79.6 - 89.5
89.6 - 97.0
97.1 - 99.0
Missing Data

Note: the boundaries and the names shown and the designations used on these maps do not imply official endorsement or acceptance by the United Nations.

Basic Capabilities Index (BCI),
ASIA, 2000

Value
- 45.0 - 64.0
- 64.1 - 79.5
- 79.6 - 89.5
- 89.6 - 97.0
- 97.1 - 99.0
- Missing Data

Note: the boundaries and the names shown and the designations used on these maps do not imply official endorsement or acceptance by the United Nations

---
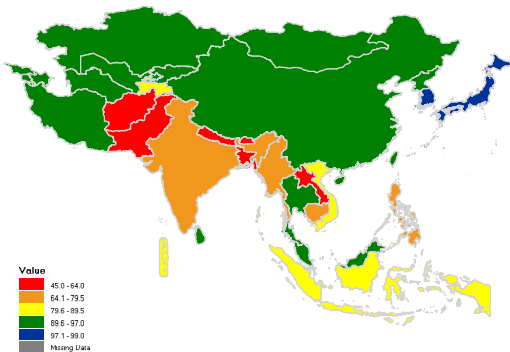
Generating BCI and GEI at sub-national levels in 3 countries…
- ❑ **Brazil**
- ❑ **Philippines**
- ❑ **India**

Updates…

➔ **Brazil has completed its study**

➔ **Philippines is ongoing (started Oct)**

➔ **India is to start the BCI study in a short while**

What's the Added Value?
Given the various monitoring system in place.

- Still fastest way to monitor human development and capabilities
- It adds to the basket of indicators needed in planning and budgeting
- It is cheap and with degree accuracy
- QLI/BCI has become even more important with race to MDG 2015
- It is MDG sensitive and complements the MDG localization initiatives

---

QLI/BCI Phils Study Still Ongoing

Research Design for QLI/BCI (Philippines)

Generate QLI for 2006 and 2008/9 for Phil. Provinces
Generate also BCI for same period for international comparison
Generate QLI/BCI for 4 Provinces, 2 Cities and 2 Municipalities for latest available year

_____

Extrapolation may be done to estimate Nutrition, Child Mortality Regional Data ➔ Provincial Estimates

_____

Do time series analysis of QLI/BCI for Philippine Provinces

QLI/BCI Phils Study Still Ongoing

Research Design for QLI/BCI (Philippines)

Validate by comparing QLI/BCI with the following:
➔ Comparing with **HDI** and **Household Income** for provinces
➔ Comparison with **MDG Index** (CBMS data)
➔ And with the **National Household Targeting System** –
a government initiative to identify the poor for the Conditional Cash Transfer (based on wealth or asset ownership)

Validate by doing case studies of high and Low QLI/BCI

Promoting Replication for other regions in the Philippines

QUALITY OF LIFE INDEX for 2003 and 2009
(2006 still for Computation)

Top 20 Provinces In QLI (2003 & 2009)

* Note that 17 of the 20 top provinces are common for both 2003 and 2009

PROVINCE*	QLI 2003	PROVINCE*	QLI 2009
Batanes	0.936	Batanes	0.917
Siquijor	0.826	Ilocos Norte	0.882
Bataan	0.821	Siquijor	0.873
Ilocos Norte	0.811	Camiguin	0.872
Nueva Ecija	0.803	Bulacan	0.854
Ilocos Sur	0.798	Bataan	0.852
Bulacan	0.795	Tarlac	0.840
Pampanga	0.773	Pangasinan	0.838
Batangas	0.771	Bohol	0.835
Benguet	0.738	Ilocos Sur	0.835
Pangasinan	0.736	Nueva Ecija	0.826
Camiguin	0.735	Pamapanga	0.824
Laguna	0.735	Batangas	0.817
Rizal	0.733	La Union	0.792
Cavite	0.732	Southern Leyte	0.789
Isabela	0.722	Abra	0.789
La Union	0.721	Benguet	0.788
Tarlac	0.717	Rizal	0.783
Tawi-tawi	0.711	Laguna	0.774
Nueva Viz.	0.709	Cavite	0.774

*Common Provinces

GEI Starting and for Finalization

Research Design for Gender Equity Index

Component Indicators (Possible to Generate for Philippine Regions)

| Women's Empowerment	% of women in technical/ professional positions
	% of women in management and government positions
	% of women in ministerial posts
	% of women in parliaments
Gender gap in economic activity and earned income	income gap
	activity rate gap
Gender & Education	literacy rate gap
	school enrolment rate gap (primary, secondary, tertiary)

An equivalent Index will be generated and test for sample Provinces, Cities and Municipalities using Proxy Indicators
- Women in elective and senior local government posts
- Women voting participation in elections
- Economic activities and incidence of unpaid labor
- School enrolment

Philippines Among Top in Gender Equality

Philippines in top 10 Global Gender Gap Index (World Economic Forum) It was the only Asian country in the top 10!

Social Watch GEI also ranks Philippines very high – 9th

GEI 2007
LESS EQUITY   MORE EQUITY
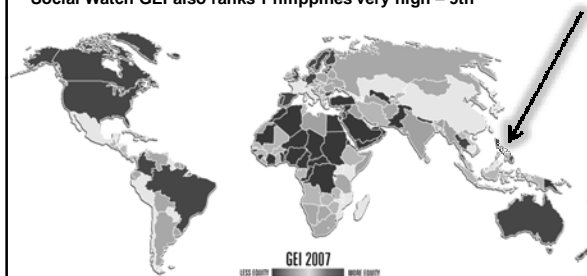
BUT…

- High Maternal Mortality
- High fertility; low contraceptive use because of religious conservatism
- High and widespread incidence of VAW
- Housewives in political position only to "serve husbands"
- Increasing prostitution and trafficking
- Phenomenon of women overseas migration, as domestic/service workers

The index can be used to put in proper context the real situation of women in the Philippines

---

GEI vis a vis other indices…

The Gender Inequality Index is designed to measure the negative human development impact of deep social and economic disparities between men and women.

The GII includes health indicators covering maternal mortality, adolescents' fertility and contraceptive use, which are missing in the SW GEI.

Whereas the GEI includes percentage of female professional and technical workers, and women in decision-making positions in govt at ministerial levels, GII only includes national parliamentary representation that excludes participation at the local government level and elsewhere in community and public life.

Most of the countries which ranked highest in the GEI also ranked high in the GII.

Except for the Philippines and Rwanda.

PHILIPPINES
-in the Top 10 Global Gender Gap Index, and the only Asian Country in the top 10
-Ranks 9 also in the Social Watch GEI
-ranks 78th in the GII

Countries with consistent high ranking:

– low maternal mortality rate, low adolescent fertility rate, and 100% births attended by skilled health personnel

- Philippines and Rwanda have high mortality rates, high AFR, and low percentage of livebirths attended by skilled health personnel

Research Design for Gender Equity Index

Workshop to be held among women's groups to finalize study design

Validation workshop to be held after to report the results to partners and local stakeholders

Focused inquiries to be done to substantiate the results of the study:
- Gender parity in education, but disparity in labor participation
- Income differentiation across gender
- Feminization of overseas work
- Reproduction health and women's empowerment

TIMELINE

December - complete the field data gathering bu

February – complete data processeing

SWP aims to complete full study by **April 2011**

Thank You and
Good Day

To ALL

Social Watch Phils.