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Veröffentlichungsversion / Published Version

Zeitschriftenartikel / journal article

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Empfohlene Zitierung / Suggested Citation:

Lepenies, P. (2019). Transforming by Metrics that Matter - Progress, Participation, and the National Initiatives of Fixing Well-Being Indicators. *Historical Social Research*, 44(2), 288-312. <https://doi.org/10.12759/hsr.44.2019.2.288-312>

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Transforming by Metrics that Matter – Progress, Participation, and the National Initiatives of Fixing Well-Being Indicators

*Philipp Lepenies**

Abstract: »Transformation durch Zahlen, die zählen - Fortschritt, Partizipation und die nationalen Initiativen zur Festlegung von Wohlfahrtsindikatoren«. The goal of governments is to enhance the well-being of their citizens. In the aftermath of World War II, national product (be it gross national or gross domestic) and its rate of growth were seen as a proxy indicator to measure well-being – making economic growth doubtless the most powerful political indicator in history. Yet, in light of the negative effects of growth such as climate change and due to methodological progress in measuring well-being or happiness, governments have begun to reconsider the belief that growth automatically leads to improved well-being. The Sustainable Development Goals of 2015 underline a universal desire to “transform our world” and the fact that this transformation is to be done with the help of alternative statistical indicators. In the last decade, a number of national governments have embarked on a largely unnoticed, but revolutionary OECD-driven endeavor: to fix national alternative measures of well-being “beyond GDP”, to decide in a participatory manner which indicators matter to people and to discuss which new or adapted notion of progress is valid in the 21st century. This paper will highlight a number of these national cases and analyze the context in which these initiatives evolved. It will be shown that although revolutionary in their aspirations, many initiatives do not live up to their expectations. This has to do with the manner in which they were executed, with the political unwillingness to really consider alternatives to GDP and to allow broad participation. But it might also show that the expectations regarding the power of indicators to guide policies might be exaggerated.

Keywords: Indicators, Alternative Measures of Well-Being, Progress, Participation, Beyond GDP.

1. Introduction

In April 2015, German Chancellor Angela Merkel informed that she planned “to converse with citizens.” The idea was “to interact with citizens, in order to

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orient future policies directly to those issues that are dear to Germans.” As a result and after about a year of discussions, a scientific advisory board would produce a final report and propose an “action plan” that stipulated how the German government is to foster well-being and enhance the quality of life of all Germans in the future. The action plan was to be based on a set of new indicators that measured whether well-being in Germany had increased – or not.¹

Recent years have seen similar initiatives in a number of mostly OECD countries. They are part of a wider international process which involves a revolutionary and participatory attempt to recalibrate our traditional notion of progress, a notion which was based to a large degree on the idea of a possible infinite expansion of the production of goods and services and that was seen as a proxy for enhanced well-being. And it was measured by Gross Domestic Product, GDP, or its rate of change, i.e., “growth”.²

It is not only the so-called “grand societal challenges” (climate change, population growth, the finite nature of fossil resources etc.) and thus the quest for sustainable development that have led to the desire to let go of the extreme fixation on GDP and growth, but also the simple empirical discovery that from a specific level of per-capita income onwards, self-perceived quality of life and happiness do not improve with further economic growth (Easterlin 1974; Scitovsky 1976). Additionally, the methodology of measuring subjective well-being and happiness has improved to the point where neuroscientists claim that these measurements (which for a long time had been dubbed unreliable and unscientific) are now perceived as trustworthy and useful for policy purposes (Kahnemann 1999; especially OECD 2008 and Layard 2005).

Most of these initiatives in question are a result of the “Istanbul Declaration” from 2007, signed by numerous international organizations as well as by the EU. The declaration expressed the need to redefine well-being and progress in countries and to fix adequate indicators by citizen participation. The Istanbul Declaration is a clear sign of the broad understanding that the fixation of transparent indicators is a necessary and suitable form of modern governance. The declaration explicitly names the apparent success of the UN Millennium Development Goals (MDG) as an important point of reference and inspiration (OECD 2008, 15). The global financial crisis of 2007 further sensitized many governments that a predominantly economic perspective on well-being was no longer helpful.

In this paper, the context of these initiatives will be explained and a comparative description of country cases will show the different processes and actors

¹ <https://www.gut-leben-in-deutschland.de/DE/Home/home_node.html>.

² Kroll (2011) speaks of these initiatives as a new “Global Movement” that has started roughly around the years 2007 and 2008. However, these initiatives have been much more prominent in the OECD member countries than in others.

that were involved in them. Although the long-term effects cannot yet be fully identified, first lessons learnt can be distilled. What will become obvious is that the fixation on statistical indicators carries the risk that the normative debate on new understandings of progress and well-being will be framed by the possibility of measurement and data availability alone. The fact that no country has yet managed to let go of the focus on growth via alternative indicators shows that these initiatives are, for the time being, not as transformative as planned. Additionally, although citizen participation has been identified as a cornerstone of these initiatives in order to ensure public ownership, relevance and accountability, participation has often been minimal and sometimes non-existent.

One of the reasons for the failure of the initiatives to live up to their expectations was the idealistic presumption to be able to come up with a meaningful and politically influential statistical counterweight to GDP. It appears that the unique role of GDP and growth was underestimated: the possible instrumental role played by alternative indicators of well-being overestimated.

In any case, looking at the initiatives of fixing alternative well-being holds interesting lessons regarding actors, institutions, discourses and debates involved in transforming by numbers. Within the recent scholarship on indicators, however, a focus on these initiatives has been notably absent (see for instance Rottenburg, Merry et al. 2015). Given their historic relevance, and even acknowledging that it is too early to distill any final verdict on them, this paper will show not only the relevance of looking at the initiatives, but hopefully also identify possible further research – be in on the role of indicators in politics, or the policies of transformation “beyond GDP.”

2. The Dominance of GDP – Political Acceptance before Theory

A single indicator, GDP (in the form of GDP per capita or of the rate of change, i.e., growth – or as Gross National Product before the 1990s) dominates politics. Although technically only aggregating the money value of all goods and services produced in a single year, the indicator has served as a proxy for societal well-being almost from the beginning. Interestingly, a political fixation on growth and GDP was already dominant *before* academics and academic research had come up with a theory of growth, or even used the concept in their models. In other words: this specific statistical indicator influenced and dominated policies before being embedded in a theoretical framework – the reason being that growth had proven to be a useful tactic to tackle various different but pressing political challenges within a very short time span (Lepenies 2013, 2015).

During World War II, Gross National Product (GNP, the predecessor of GDP) was invented in the United States by government institutions that were in

need of an indicator whose change would document armament production as well as the transformation of a peace-time economy into a war economy. The entire war planning efforts and resulting political strategies were linked to the growth of industrial production. GNP quickly became a dominant indicator used by politicians (such as Roosevelt), but also by the press and other media. The historian Russel Weigley aptly spoke of World War II as a “GNP war” (Weigley 1973). But although GNP was so closely related to war, growth of GNP and a focus on enhancing industrial output remained the dominant priority of politicians after fighting had ended. However, the justification for stressing an expansion of production had shifted. A growing GNP and by that an expanding mostly industry-based economy was a necessary precondition for the re-integration of returning servicemen into the American job market. At the same time, the Marshall Plan made it necessary to find a statistical common ground to evaluate and compare the economic strength of recipient countries of the funds. GNP thus quickly became the standardized measure of comparison between different countries and regions, even the world. In the arms and system race with the Soviet Union, and without credible information regarding the real economic strength of the Russians (an atomic power able to shoot satellites and cosmonauts into space), economic growth was seen as vital in order to survive in the Cold War. When in the aftermath of the World War, the material living standards of many people in the West improved in a historical unprecedented and rapid way, GNP readily served as an indicator for overall well-being (Lepenies 2013). GNP and its rate of growth quickly became the numerical expression of Western lifestyle, high levels of material progress and prosperity (Collins 2000). GDP, in other words, shifted from an accounting tool into a holistic political indicator.

A full-fledged theory with the dogma of growth at its core appeared only in the second half of the 1950s. Arthur Lewis’s publication “The Theory of Economic Growth” from 1955 was the first economic monograph that took up the issue³ (Lepenies 2015). A few years later, the political literature of modernization theory embedded growth in their vision of a possible westernization of the world. Western material living standards and Western democratic institutions and freedoms were linked to economic growth and rising per capita income. All positive elements of the “American way of life” had something to do with the economy and how fast it grew (Lerner 1958; Lipset 1959; Rostow 1960). In this fashion, the former enlightenment vision of progress entailing a process of incremental civilization was given a modern touch through the emphasis on growth. But the universalist approach and the teleological unilinearity and inevitability of the traditional view of progress were kept in place (Lepenies 2014a). In equating growth with well-being, economists could also rely on the

³ This was already anticipated in his seminal 1954 paper on the “Unlimited Supply of Labour” (Lewis 1954).

ideas set out by Cecil Pigou in his “Economics of Welfare” (1920) in which he argued that for lack of alternatives, the “measuring rod of money” had to be relied upon to measure what he called “economic welfare.” Pigou acknowledged that economic welfare was not the same as general welfare. But he made a bold claim: if economic welfare rose through higher income, than it could be argued that general welfare improved as well.

Starting in the 1960s, the political dominance of the idea of growth and the methodological shortcomings of GNP were subject to an ever growing body of criticism (see e.g., Seers 1969, who spoke of a “problem of measurement,” see also Tobin’s and Nordhaus’s famous paper “Is Growth Obsolete?” from 1972 or the seminal Club of Rome publication “The Limits of Growth”). Within development theory, it was telling that alternative approaches, be it the Basic Needs approach (Hunt 1989) or, to take another example, the concept of Human Development (UNDP 1990), often explicitly tried to establish counter-indicators to GNP or GDP. However, these critical voices never succeeded in establishing universally accepted alternatives (in the sense of a true paradigm shift).

The same holds for the Millennium Development Goals (MDG). The MDG were based on an initiative of the OECD that was to counter mounting criticism that the international community had lost track of the social dimension of development (especially the question of poverty). This referred to the years of neoliberal market euphoria in the 1980s and 1990s when the policy focus lay on how to foster growth through liberalization and macroeconomic stability. Instead, the MDG attempted to integrate the logic of Results-Based-Management (which relies on the fixation of measurable goals in order to assess job performance) into the international policy arena – after this had proven useful in a number of member states in the modernization and reform of public administration. The MDG did not surpass the fixation on GDP, but they established the belief that a system of indicators or goals could be fixed to guide and direct policies. The Sustainable Development Goals (SDG) show that this belief is still prevalent, as do the national initiatives to fix alternative measures of well-being (Lepenies 2014b; Hulme 2007). As noted above, the advances in the measurement of well-being additionally provided optimism that a thorough counterweight to GDP could be found that could focus on other things than “the measuring rod of money.”

3. The New Role of Statistics – Beyond GDP

In 2007, the OECD World Forum “Statistics, Knowledge and Policy” was held in Istanbul. The final document, the “Istanbul Declaration”, signed by the OECD, the European Commission, the United Nations, the World Bank and many other international organizations, spoke of an

emerging consensus on the need to undertake the measurement of societal progress in every country, going beyond conventional economic measures such as GDP per capita. (OECD 2008, 15)⁴

According to the OECD, the “information age” allowed access to ever more forms of data. This not only made it possible to come to grips with the complexity of the modern and globalized world, it was above all, a chance for the survival of democracy:

Increased access to relevant information for citizens will improve the quality of their decision-making and the accountability of their leaders. Better knowledge among citizens and leaders will translate into enhanced policies and a better future for the next generation. Knowledge about progress, about whether or not life is getting better in a society, is one of the most important ingredients in this process. (OECD 2008, 3)

The idea that statistical information and statistical indicators could alter the interplay between citizens and governments, that the dialogue between the two groups could be based on a transparent and evidence-based fundament, was a consequence of the lessons learnt from the MDG. The MDG were hailed as a new form of understanding and communication between donor and recipient countries, as well as between the citizens of these countries and their governments. With the fixation of alternative measures of well-being and new measures of progress, the OECD wished to establish a similar relationship within OECD countries.

The desire to fix new measures in order to foster democratic processes stemmed from a crisis of credibility of official statistics, a dramatic “distrust in public figures,” that the OECD had identified in various member countries. In countries such as France and the United Kingdom, only one third of the citizens trusted official figures (OECD 2008, 20; Stiglitz, Sen, and Fitoussi 2009, 3). This distrust, that was based on the fact that GDP figures did not seem to reflect whether life was getting any better for citizens, let alone measure what was dear to them, led – according to the OECD – to a crisis of democracy, that could be overcome through the initiatives of fixing alternative indicators of well-being. For this to happen, two things were important: firstly, a general and open debate on the nature of progress in our times (“encourage communities to consider for themselves what ‘progress’ means in the 21st century”) and secondly, that the citizens should actively participate in this process.

⁴ A major reason for the belief that alternative measures of progress in a different form than GDP was feasible lay in the progress made in the methodology of assessing subjective well-being and in general, the influence of happiness research on political debates that claimed the objective measurability of aspects hitherto unmeasurable. The role of the Istanbul Declaration as a political norm should not be overestimated – yet, it is a clear expression of a widespread institutionally felt need to look into politically feasible statistical alternatives to GDP.

The ideal way forward was sketched by then general secretary of the OECD, Angel Gurría, in his conference contribution “Measuring Progress: Does it make a Difference for Policy Making and Democracy?”:

What if we could build, in each and every country, an institution for progress? An institution where different parts of society (government, opposition, trade unions, business associations, NGOs, academia, media, statisticians and others) could discuss what progress means to them and the key indicators to measure it. An institution whose progress indicators are seen as having authority and legitimacy. (OECD 2008, 22)

The Declaration called for urgency in starting the process of fixing new measures of progress. Within the OECD, the project “Measuring the Progress of Societies” was established in the aftermath. This ultimately resulted in the calibration of the interactive indicator system “The Better Life Index” (OECD 2013). The European Commission followed up with the initiative “Beyond GDP” in 2007. The G20 summit of 2009 encouraged its members to rethink measurements and to engage in a dialogue with society.

4. Measuring Well-being and Participation

A number of countries reacted to the Istanbul Declaration. The process of how various national initiatives came into being will be described as will the question of how national statistical institutes were involved, whether and how citizens participated and whether new ideas of progress and well-being were discussed. Different country cases will be presented that show not only whether the suggestions of the declaration have been taken into account, but how different contexts have given rise to completely different forms of tackling the issue of finding measures “beyond GDP” in a participatory and consequential manner. The sample countries were selected in order to show the broad array of different approaches. They comprise France, Australia, Great Britain, Italy, Austria, and Germany.⁵

4.1 France: The Stiglitz–Sen–Fitoussi Commission

As early as February 2008 and at the beginning of the global economic crisis, French president Nicolas Sarkozy was the first national leader to take up the suggestions of the Istanbul Declaration and the issue of alternative measures of

⁵ For an earlier comparison of national case studies, see Lepenies and García Díez (2017). The order of presentation is justified by highlighting first the most prominent case to stem from the Istanbul initiative (France), then to highlight the country with a longstanding tradition of looking into alternative indicators (Australia), after that to include Great Britain, that followed the French project as well as the subsequent schemes in Italy, Austria and Germany.

well-being. The “Commission on the Measurement of Economic Performance and Social Progress,” led by Joseph Stiglitz, Amartya Sen, and Jean-Philippe Fitoussi that was created at Sarkozy’s request was composed of a group of the world’s most eminent social scientists and economists (amongst others Kenneth Arrow, Anthony Atkinson, Angus Deaton, Daniel Kahnemann, Robert Putnam, Nick Stern, and Cass Sunstein). After one year of deliberations, it published a report on the issue of possible alternative measures of well-being that instantly became and still is the major reference point on the topic due to its thorough theoretical presentation and analysis (Stiglitz, Sen, and Fitoussi 2009).

In the classical French tradition of technocracy, the commission consisted of excellent technical experts on the matter – but public participation or deliberation was not a visible part of the exercise.⁶ Rather than produce a final list of indicators, and although the report was based on the credo that “what we measures affects what we do – and if our measurements are flawed, decisions may be distorted” (Stiglitz, Sen, and Fitoussi 2009, 7), the report limited itself to presenting suggestions. Next to ideas as to how GDP could be improved, it called for a dashboard-approach (instead of searching for a single new aggregate indicator), i.e., that a selection of important indicators should inform politics. The general focus should no longer be on production, but on well-being, especially on human capabilities as well as on issues of sustainability in the broadest sense. Moreover, human well-being was to be measured not only by objective, but also by subjective measures. Through these recommendations, especially the ones on subjective well-being and by coming mostly from economists, the innovative character of the report made itself felt.

The foreword written by Sarkozy for an abbreviated version of the report published under the title “Mismeasuring our Lives” was remarkable in that he admitted that politicians were slaves to a “cult of data” (with respect to GDP), but that the numbers had ever less to do with the felt reality of many citizens and were no longer useful in reflecting the challenges of our times. He also wrote that a growing number of citizens felt deceived by official indicators and that this, just as the OECD and others had cautioned, was jeopardizing democracy (Stiglitz, Sen, and Fitoussi 2009, viii). The report was addressed to political leaders, policy makers, the academic community as well as civil society organizations. It was seen as a first step in a global discussion on redefining and re-measuring social progress (Stiglitz, Sen, and Fitoussi 2009, 10) and positioned France as a country that, by direct intervention of its president, took the issue of alternative measures seriously. Yet, although the report highlighted

⁶ Some experts of the commission had, in fact organized a “forum pour d’autres indicateurs de richesse” in order to allow some form of public interaction. The forum proposed amongst others the idea of a “produit intérieur doux.” However, the impact of this endeavour on the commission was negligible.

the importance of subjective well-being, it did so without thoroughly incorporating the views of its own citizens.

Following the publication of the report, the European Statistical System Committee formed a so-called “Sponsorship Group on Measuring Progress, Well-Being and Sustainability” headed jointly by Eurostat and the French national statistical institute (INSEE). This group consisted of technical experts of various European statistical institutes. It was to provide suggestions as to which concrete indicators could be used in order to operationalize the ideas set out in the Sarkozy report and what steps should be taken in order to implement them. The final report of the group was published in 2011 and served as a framework for various national initiatives (European Statistical System 2011) on methodological and organizational matters.

4.2 Australia: MAP – Measures of Australia's Progress

Australia is a special case. In all questions regarding measuring alternatively and allowing for citizen participation, the country is a pioneer and started as early as 1996. At that time, and in part influenced by the 1992 UN Rio Summit, the national statistical office, the “Australian Bureau of Statistics” (ABS) was given the task by the Australian Senate to develop measures that would paint a better picture of the well-being of Australians.

In 2002, Australian statisticians published the first indicator report “Measures of Australia's Progress” (MAP, ABS 2002). It contained a series of statistical indicators from the dimensions economy, society and environment – and was an international milestone. The strategy behind this selection was to provide a holistic but easily understandable overview over the state of the country and the well-being of its citizens. In contrast to the Sarkozy report, the MAP report was geared at the wider public, not at specialists or decision makers alone. A particular emphasis was placed on the question of whether statistical indicators could show if quality of life was improving or declining (“Is Life in Australia getting better?”). In this way, the progress of the nation as a whole was to be described, not the success or failure of specific governmental policies – the measures were measures of national well-being. Moreover, the report adopted a so-called “suite-of-indicator” approach, which implied that relevant indicators were presented, but that the reader had to conclude on his or her own whether the country was progressing or not, as no final verdict was presented by the Bureau itself. One of the masterminds behind MAP was Jon Hall, a statistician who was to move to the OECD to become a major policy entrepreneur for the cause of well-being measures and the OECD approach behind it.

Ten years later and as a reaction to the Istanbul Declaration, the indicator set was put to test. Australian statisticians wanted to make sure that the dimensions and indicators selected a decade earlier were still seen as relevant. For this purpose, the ABS conducted a broad national debate in the year 2011/2012

under the heading “What is important to you for national progress?” The public was to discuss relevant topics and dimensions of well-being. A special emphasis was placed on the aspirations of Australian citizens.

The enquiry started with the online publication of a discussion paper (ABS 2010) which presented the framework and the main dimensions about which information and opinions were sought. With the goal of learning about the state of progress in the country, the emphasis of the survey was placed on the dimensions society, economy, environment and governance. Over the course of 18 months citizens were involved via various channels: blogs, social media, radio shows, conferences, workshops, etc. In order to reach a broad segment of society, a number of celebrities were made part of the project and voiced their own ideas regarding progress in order to incite interest and reactions from others. An expert commission accompanied the entire process while integrating new insights from international and national academic research, as well as the needs of local and national administration and organizations. Next to that, a separate and special expert group for each of the four dimensions counseled the ABS. The findings were published in the report “Measures of Australia’s Progress – Aspirations for our Nation: A Conversation with Australians about Progress, 2011-12” (ABS 2012a, see also ABS 2012b) in which the participatory element was especially highlighted. In the debate that covered elements of a new definition of progress (Where do we want to go? What do we aspire to? What are our goals?) the ABS saw its role as a facilitator whose duty it was to translate public opinion into numbers, but who first had to see that this public opinion was expressed.

With the initiative “MAP 2.0” the ABS subsequently attempted to scrutinize by participatory means which concrete progress indicators Australians wanted to see fixed at the national level. These indicators were to measure more concretely if Australia was in fact progressing or not. In all these phases the ABS was acting without any form of direct political influence. It was able to position itself nationally and internationally as an innovative institution that allowed citizens to voice their aspirations and their ideas of quality of life while at the same time feeling an obligation to transform these opinions into numbers and to disseminate relevant information on these issues to the wider public and to the political realm.⁷

Yet, since 2014, when the ABS saw severe budget cutbacks from the Abbott and other governments due to continuing large deficits, the Measures of Australia’s Progress have no longer been updated and the exercise discontinued. The last data is from 2013. Social statistics in Australia have been cut in order to allow a concentration on continuing issuing reliable economic statistics to

⁷ <<http://blog.abs.gov.au/Blog/mapblog2010.nsf/dx/about-map-2.0.htm>>.

governments that have made it clear that growth and GDP were, not only in terms of statistics, what mattered most.

4.3 Great Britain: "Measuring National Well-Being Programme"

In November 2010, recently elected Prime Minister David Cameron ordered the Office of National Statistics (ONS) to produce and publish reliable, comprehensive and relevant statistical data concerning the well-being and progress of British society (National Well-Being Programme). In a well-received speech in which he introduced his plans to re-define and measure well-being, Cameron spoke of a "new school of thought about government's role in improving people's lives in the broadest sense" according to which it should be the duty of government to cater to improving the well-being of its citizens (Gov UK 2010). Next to a tribute to the report of the Sarkozy commission, he referred to the work of Richard Layard, an economist and happiness researcher (dubbed "happiness tsar" by the British press), who for years had argued that improving happiness was the prime responsibility for governments and concrete actions should be taken accordingly (Layard 2005).⁸ The United Kingdom is the country where not only the lobbying influence of happiness researchers has been most pronounced, but where ideals of (Neo-)Benthamite utilitarianism that combine well-being or happiness with measurement have always had a political following and where the use of the word "happiness" in political debates is much more common than in other countries. The innovative work of the New Economics Foundation (NEF) on the measurement of well-being was also influential in the British case, as was the fact that practically all competing parties had, during the election rally, taken up the issue of fostering well-being (Allin and Hand, 2017). The visionary character of the initiative was reflected (albeit not very precisely) in an article in the Guardian entitled: "David Cameron aims to make Happiness the new GDP" (The Guardian 2010). Cameron stated that he wanted Britain to be "in the vanguard" of efforts around the world to change the accepted measures of national progress "rather than following meekly behind" (BBC 2010) and funded the program with two million additional pounds.

Mirroring the Australian initiative and the Sarkzoy-report recommendations, the ONS started its "Measuring National Well-Being Programme" (ONS 2011) with a national debate on the question of which topics and issues mattered to the people ("What matters to you?"). The debate went on for five months, with an impressive participation by the population (34,000 private persons and organizations voiced their opinion in workshops and participated in surveys in which they could deliberate on their own without government officials or other experts present). Similar to Australia, various channels (online-fora and public

⁸ <<https://www.gov.uk/government/speeches/pm-speech-on-wellbeing>>.

events) were offered to allow a large number of participants. However, although many different regional and societal groups were integrated, the results of the exercise were not statistically representative of British society.

The general debate was structured by an ONS discussion paper in which five major questions were asked:

What things in life matter to you? Of the things that matter to you, which should be reflected in measures of national well-being? Which of the following sets of information do you think help measure national well-being and how life in the UK is changing over time? Which of the following ways would be best to give a picture of national well-being? As well as: How would you use measures of national well-being? (ONS 2011)

A broad acceptance of the initiative and results by citizens' deliberation were the main goals of the British project. Moreover, the indicator set was to include objective measures (economic, social, ecological) as well as measures of subjective well-being, i.e., the perception of one's own quality of life. In 2011, the household surveys of the ONS were extended by questions regarding subjective well-being.⁹

Two advisory expert groups, the "Advisory Forum", made up of representatives of private sector enterprises, academia, politics and other relevant stakeholders, as well as a statistically trained "Technical Advisory Group" counseled the ONS.

Since then, the ONS has published a number of reports on the state of well-being in Britain, some every six months, for instance the "Life in the UK Report" (ONS 2015), next to an "Annual Statistical Bulletin on Personal Well-Being" (ONS 2014) as well as other thematic reports and interactive indicator data online. The ONS reports on

progress against a set of headline indicators covering areas of our lives including our health, natural environment, personal finances and crime. The measures include both objective data (for example, unemployment rate) and subjective data (for example, satisfaction with job) to provide a more complete view of the nation's progress than economic measures such as gross domestic product (GDP) can do alone. (ONS 2017)

The indicators are visualized online through an interactive dashboard.

Yet, in his remarkable speech on well-being, David Cameron, after dwelling in detail on the need to look for alternative measures to GDP, felt obliged to state the following:

People are concerned that talking about wellbeing shows that this government is somehow sidelining economic growth as our first concern. At a time when we are recovering from the longest and deepest recession since the war, they say that all our energies should be just focused on driving up GDP. Now, let

⁹ <www.ons.gov.uk/ons/interactive/well-being-wheel-of-measures/index.html>.

me be very, very clear: growth is the essential foundation of all our aspirations. (Gov UK 2010)

4.4 Italy: ISTAT/CNEL – “Benessere equo e sostenibile”

The goal of the Italian project “Benessere equo e sostenibile” (BES) which was initiated and executed by both the statistical institute ISTAT as well as by the official council of economic advisors CNEL (“Consiglio Nazionale Economia e Lavoro”) was to produce an indicator set to measure progress and quality of life in Italian society. The director of ISTAT, Enrico Giovannini, had for a long time been chief statistician of the OECD and one of the heads (together with Jon Hall) behind the Istanbul Declaration and the international movement to redefine measures of progress. He was also member of the Sarkozy Commission. In the Italian case, a mandate of the Italian government was missing.

Two advisory groups were formed and a broad national survey was held. The thematic scope of the indicator set was based on the results of the survey. This was done in face-to-face interviews, blogs as well as regional workshops. As a result, 2,500 questionnaires were compiled and consultation meetings with an expert-led 33-member steering committee were held (consisting of entrepreneurs, unionists, women’s rights groups, consumer groups etc.). From these discussions, twelve dimensions were identified. In a second step, a group of academics and researchers as well as the members of the steering committee decided on the best possible statistical indicators for each dimension. The final results were roughly 130 selected indicators. These were published annually since 2013 in the “Rapporto BES” (ISTAT 2013). Interestingly, one of the dimensions was titled “Patrimonio culturale.” In the interviews and surveys it appeared that for Italians, one specific thing was of special importance to them, namely “l’italianità” – i.e., all things that define being Italian.

From 2016 onwards, the indicator set has been integrated by law into the “Bilancio dello Stato” and since 2018, a selection of twelve BES indicators will form part of the official evaluation indicators of the Italian government with the help of which the impact of policy actions are to be assessed. This is to be done in February of each year. Patrimonio culturale is no longer part of this selection. Thus, only a fraction of the initial BES indicators has made it into official statistics.

4.5 Austria: Statistik Austria – “Wie geht’s Österreich?”

In 2012, Austria set out to create its own alternative indicator set. The initiative came from the director of the statistical office, the so-called “fachstatistischer Generaldirektor,” as a reaction to the international debate and the publication of the report of the European “Sponsorship Group.” As in the other cases, the goal of the exercises was to allow a broader understanding of the notions of progress and well-being of society and to find adequate measures.

“Wie geht’s Österreich?” (How is Austria doing?) was conceived as a project that would be the result of a cooperative effort of official statisticians, politics and academia. However, the indicators covering the dimensions well-being, quality of life and environmental sustainability were only fixed through a dialogue (in the form of various round-table meetings, expert conferences and written feedback) with relevant stakeholders from academia, interest groups and different ministries. The set was to guide and cater for the needs of “relevant actors” in the “best possible way,” it was not directly geared at the broad public (Pesendorfer et al. 2012, 5).

After a first fixation of the indicator set “BIP+30” (Statistik Austria 2013) a yearly update as well as an update of the selected indicators was envisaged. Important aspects for the Austrians were international comparability of the indicators and coherence with the European suggestions. Public participation was foreseen at a later stage. The early participation of the technical and political stakeholders, however, was believed to contribute to “a broad national decision making and acceptance of the indicator set” (Statistik Austria 2013, 26). The wider public was to be able to inform itself through yearly reports and interactive graphics on the homepage of Statistik Austria. The indicator set was to provide the backdrop to a more thorough national debate (Pesendorfer et al. 2012, 16).

In the aftermath of this exercise, the Austrian Ministry of Agriculture and the Environment (renamed the Ministry for Sustainability in 2018) has begun to coordinate a network comprised of various ministries, private companies, NGOs and interest groups under the title “Wachstum im Wandel” (which could translate both as “Growth in times of change” and “Changing Growth”) that regularly organizes conferences, discussion papers and other forms of transdisciplinary networking features in order to discuss relevant issues regarding quality of life and alternative concepts of well-being and environmental sustainability. It is linked to the “Wie geht’s Österreich” initiative, yet independent from it and it remains unclear whether it will exert any influence on future adaptations to the indicator set.

4.6 Germany: “W3” and “Gut Leben in Deutschland”

In Germany, the suggestions of the Sarkozy-Commission as well as the Istanbul Declaration first gave rise to expert deliberations in the form of a joint report issued by the German and French council of economic advisors (German Council of Economic Experts 2010). In contrast to the bold vision of the Sarkozy report, the technical experts (mostly economists) forcefully argued against the use of measures of subjective well-being and suggested a more traditional dashboard of economic and social indicators instead. Their suggestions, however, were not taken up by political decision makers.

In 2009, and in a rare moment of political unanimity, all parties of the German Bundestag voted to install a parliamentary enquete-commission titled “Wachstum, Wohlstand, Lebensqualität. Wege zu nachhaltigem Wirtschaften und gesellschaftlichem Fortschritt in der Sozialen Marktwirtschaft” (Growth, Well-Being and Quality of Life, Pathways to a Sustainable Economy and Societal Progress in the Social Market Economy). The commission consisted of 17 technical experts and researchers and 17 members of parliament of all political parties. This group met regularly between 2010 and 2013 and was, at the beginning, met with large interest by the media. The commission was given two different tasks. To discuss the role and future of growth and GDP and to provide an alternative measure. Concretely the commission was required to:

develop *a holistic indicator of well-being and progress*. In order to allow a suitable basis for assessing political decisions by taking into account economic, ecological and social criteria, it should be scrutinized how factors of quality of life and societal progress can be taken into account and condensed into *a single indicator*....*Ideally, a new indicator* should be developed that is measurable and comparable and that will complement GDP. (Deutscher Bundestag 2010, my emphasis)

Public participation was not foreseen. Over the course of time, two opposing fractions manifested themselves: one in favor of sticking to growth and GDP as a proxy for well-being, the other calling for a radical break with growth-dominant policies and metrics. Both positions were irreconcilable. For the first time in the history of German parliamentary enquete commissions (that usually agree on the definition of problems as well as on the solutions to be taken by politicians) no unanimous final report was possible. Rather, the almost 1000 pages of text consist of two different parts with two completely differing viewpoints: one in favor of GDP (albeit of a more “qualitative” version of it), the other calling for a radical transformation of the economy, society and the corresponding metrics. Moreover, the idea that a single new indicator would be found quickly proved unfeasible. Instead, after lengthy discussions, the commission presented a dashboard of different indicators. Dubbed “W3” (Deutscher Bundestag 2013) and named after the three dimensions of well-being that it attempted to cover with its overall 12 indicators – participation, ecological and material well-being – the government was asked to integrate the set into an official annual report on the state of the nation, parallel to the yearly reports issued by the German council of economic advisors.

Although it was the legislative body of German politics that had worked on the alternative measures, even if this was done without any participatory element, its implementation and adoption was directly impeded by the executive branch. The ministry of the interior did not mandate the federal statistical office to publish the indicator set by claiming that it required the go-ahead of the federal chancellery which it lacked. A few days after the statistical office had presented the W3 dataset on its website on its own initiative after the report had

been published, it was forced to delete it. After the press and many experts had wondered why such financial resources and effort had apparently been wasted (a newspaper article ironically titled that “Our Government ignores expensive Happiness Formula!” (Welt 2014), the 2013 federal election provided an answer.

In the coalition contract following the general elections of 2013, the ruling parties of the Christian Democrats and Social Democrats held that their goal was

to link governmental practice more strongly to the norms and preferences of the citizens and will therefore engage in a dialogue with them over their understanding of quality of life....On the basis of this dialogue, we will develop an indicator set and report on the quality of life in Germany. In regular intervals, these reports shall inform in a comprehensive and approachable and understandable manner on the state of quality of life in Germany and progress made. (Bundesregierung 2016, 3)

Apparently, the executive branch saw that an exercise such as the one undertaken by Cameron in the United Kingdom – with publicity and public participation – could serve to show that governments cared.¹⁰

The project “Gut Leben in Deutschland – was uns wichtig ist” (“Living well in Germany – what matters to us”) was thus started in April 2015 – as if the enquete commission and its results had never existed. The lead institution was the German government in the form of the federal chancellery. The initiative was dubbed directly as a “governmental policy” which integrated all other ministries. Through the internet as well as through more than 200 nationwide so-called citizen dialogues (organized by clubs, churches, social organizations and unions) at which usually two members of government were present, two questions were discussed: what is important for you in your life? as well as: in your opinion, what constitutes quality of life in Germany? Almost 9,000 citizens participated in the dialogues, more than 7,000 answered questions online or via mail, several thousand comments were given electronically. An academic advisory group consisting of six persons was given the task to translate the results of the debates into measurable indicators. The experts were drawn from research institutes and the federal statistical office. They were to act “independently” and to combine the voiced preferences of the citizens with state-of-the-art research findings which they presented in the form of discussion papers.

The idea was that the report would directly feed into concrete policies. The federal statistical office was not given the mandate to execute the initiative, nor to monitor the indicators and the data.

The final report published in late 2016 highlighted how close the understanding of quality of life was to the concept of sustainable development – as it

¹⁰ After announcing the initiative, Cameron’s approval ratings were especially high (Guardian 2011).

was seen as a holistic concept comprising the economic, social and ecologic dimension. In contrast to the British case, the report clearly expressed that the role of government was not seen as catering to individual happiness. Instead, the responsibility of governmental action was to provide the framework and necessary institutional setting that allowed humans to pursue their individual goals (Bundesregierung 2016, 3).

The citizens' inputs were supposed to reflect German society's heterogeneity. Yet, they were not statistically representative. Improving the quality of life was stated as a prime obligation of government – and the initiative was understood to serve as the starting point of a continuous societal debate. In the final report, the indicator set consisted of twelve dimensions and 46 indicators.

During the course of the year 2015, however, public opinion was influenced to a large degree by the mounting refugee crisis and the hasty and massive influx of more than a million mostly Syrian and Afghan refugees into Germany. The public participatory events of the initiative were ever more focused on the issue of refugees and national security. This explains why the single most important issue for Germans, according to the participatory events of the initiative, was the desire for “peace” – something which a year earlier, would almost certainly not have had as much influence on the hearts and minds of Germans who suddenly saw themselves directly confronted with effects of civil war in Syria.

Yet, the initiative itself took place largely without the general public taking note of the original goal. Additionally, the initiative was met with incredulity and was frequently mocked in the German media from the start, even in the more serious daily newspapers. These often ridiculed the fact that in the year 2015 a government made such a fuss about wanting to know what people really wanted. When the final report was issued media coverage was minimal at best and given the upcoming general elections, no mention had been made as to whether these indicators will inform governmental politics in the future.

5. Some Observations on Indicator Sets

Generally, there is “so far no agreed framework for measuring national well-being” (Allin and Hand 2017, 7). The basic structure of most existing indicator sets derives from the main areas suggested in the Sarkozy commission report: economic performance, quality of life and ecological sustainability. To date, no novel aggregate indicator has been proposed. Instead, the dashboard approach dominates. The main areas usually consist of different dimensions. The number of dimensions varies greatly from country to country – from a handful to up to 20. Yet, a number of the following issues are usually found in most indicator set dimensions: material well-being, social inclusion, health, employment,

housing, security, education, political participation, subjective well-being, and the environment.

These dimensions then are quantified by lead indicators, i.e., those indicators which have been identified as being most suited to give a good quantifiable overview. In the case of Italy, the number of lead indicators in the first set was 130 (ISTAT 2013).

The fixation of a single lead indicator is no easy matter. If the main dimension is in itself vague or fairly broad such as *social inclusion* there are numerous possible statistical indicators that highlight different aspects of the dimension in question but often no single representative statistic to capture the dimension in its entirety or to allow a verdict on the state of the dimension. For other dimensions there might be the difficulty to find an indicator that is robust, commensurable and for which data is available from official or credible sources or regularly over time.

Some indicators are selected because they have already been part of the data collected by statistical authorities. In the main area of material well-being, the indicators most often selected are those which long have been part and parcel of the system of national accounts (e.g., available household income) or of the European Union Statistics on Income and Living Conditions (EU-SILC) like the risk-of-at-poverty or the 80/20-relation.

Concerning the dimension of quality of life, typical indicators are life expectancy, self-perceived health perception, the unemployment rate, work satisfaction, feelings of physical safety, the educational level of a society, satisfaction with time-use as well as indicators of overall life satisfaction.

Regarding environmental sustainability, two lead indicators have proven dominant: air pollution through emissions and the percentage of renewable energy within gross energy consumption. National peculiarities are visible in the different sets. Whereas Austria's set is characterized by a broad array of indicators concerning the environment, Australia's set is concerned with oceans and water. The United Kingdom established the set that most thoroughly highlighted subjective well-being (in which 18 of 38 lead indicators include subjective perceptions).¹¹

A major challenge in fixing measures of well-being is not only that they have to be comprehensible and data available, but that changes in data allow

¹¹ For instance: "percentage with medium or high rating of satisfaction with their lives overall, percentage who rated their happiness yesterday as medium or high, percentage who were somewhat, mostly or completely satisfied with their social life, percentage who were somewhat, mostly or completely satisfied with their health, percentage who were somewhat, mostly or completely satisfied with their use of leisure time, percentage who felt very or fairly safe walking alone after dark, percentage who agreed or agreed strongly that they felt they belonged to their neighbourhood, percentage of those who have trust in national Government or percentage who report finding it quite or very difficult to get by financially" (ONS 2015).

for an accurate assessment of whether a situation is improving or deteriorating. In a dashboard approach, difficulties arise through different scales and measurement units, the different aspects of well-being highlighted as well as through the trade-off involved in selecting a number of indicators that is easily communicable. Closely linked to the issue of selection and communication is that of visualization. Here, the initiatives and institutions involved have opted for different web-based and often interactive approaches.

6. Conclusion

If one considers the various recent national initiatives of fixing alternative indicators of well-being along with the communications of organizations such as the OECD, it appears as if we live in revolutionary times. Not only is the dominant position of growth and GDP put into question – which would not be a novelty in itself – but alternative measures to GDP are looked for and participatory processes of finding out “what matters” are actively undertaken by *governments*, or at least by *public institutions* for the first time (rather than by NGOs or academia).¹²

The fact that the issues of “happiness,” “well-being,” and “quality of life” (which can be used interchangeably) have entered into political discourses and have even been attempted to be translated into policy-relevant statistical indicators is undoubtedly a remarkable and historically unique development. This is even more remarkable taking into account that this is done in a clear understanding that the “cult of data” regarding GDP and growth comes at detrimental consequences and requires a change of perspective and policies with the help of alternative measures.

Yet, the various national initiatives and their evolution do not fully live up to their expectations. One important reason for looking for “metrics that matter” has been the observed “distrust in public figures” that had been identified as a jeopardy to democracy. This is also the reason why citizen participation was seen as a vital mechanism not only in fixing indicators but in general discussions on novel visions of “progress in the 21st century.” Public participation has not been a general characteristic feature of the various initiatives. It was possible only in some cases in which no representative sample of the population took part. It might rightly be considered novel that parts of the population have been given the possibility to voice their preferences and concerns during a political process like this at all. But this has been a far cry from the proposed idea of a broad societal deliberation on a new concept of progress for the 21st

¹² For an application of the Multiple Streams Approach to the British initiative, see Bache and Reardon 2013.

century. Linking the discussions on progress to questions of measurability has narrowed the scope of public deliberation as progress means much more than just the question of how to measure things. It has made it much harder to discuss the often non-quantifiable normative issues regarding the society people want to live in (regarding for instance questions of fairness and inequality or new narratives of what constitutes progress altogether). It has been shown that in most cases, public and media interest in the exercises withers away with time. Apparently, “the level of outreach and media coverage of the initial national debate cannot be maintained” (Allin and Hand 2017, 15).¹³

Consequently, the national search for metrics that matter has become a mere technical exercise in which technical experts and technical institutions (such as statistical offices) dominate. The result has often been a compendium of statistical measures that have been around for some time but are presented in a novel framework. The only real novel quantitative approach, and one that not every national initiative considers, is that of subjective well-being.

Moreover, not only have some indicator sets been established without the initiatives of governments by statistical offices themselves, some initiatives have been halted or obstructed by governments, others simply ignored. It is unclear whether the metrics themselves have had any direct influence on governmental actions. In some cases this is natural, as only radical transformative policies with long-term implications might show a change in specific indicators over time. These potential policies, however, might transcend the political time horizon of active governments, as they do not influence upcoming elections. Furthermore, having indicators measured does not automatically mean that politicians will be willing or able to base their policies on them. The institutional aspects: Which institution decides on measurability? Which one collects and administers the data to the metrics? Is it adequately and sustainably funded and staffed and can it act without interference are issues that should not to be underestimated. They can jeopardize the whole exercise.

Notwithstanding, there seems to exist on the one hand within the political realm a somewhat naïve belief or rather naïve hope in finding an equally powerful alternative to match GDP and growth – as became clear in the terms of reference to the German enquete commission that spoke of the need to develop a single (!) holistic alternative metric.¹⁴ It is obvious that a dashboard does not provide the powerful single counterweight to GDP. And there also exists on the other hand at times a political reluctance to really consider going beyond GDP.

¹³ There is undoubtedly, however, a trade-off between political and practical feasibility and transparency in terms of indicators and overall question of fairness, a good life, and progress.

¹⁴ There are suggestions as to calculate single „national“ aggregate indicators such as the Genuine Progress Indicator or the German „Nationaler Wohlfahrtsindex“ (Dieffenbacher 2013) although with negligible political influence.

This can only explain why the EU project “Beyond GDP” was renamed “GDP and beyond” (EU 2009) making clear that GDP was there to stay – just as the remarks by Cameron had suggested.¹⁵

Here, it is helpful to reconsider the unique history of GDP. In contrast to the contemporary alternative measures, GDP was developed at a time in which a specific, pressing and concrete political task had to be resolved quickly: managing and winning the war. It was a coincidence that the metric proved useful in tackling subsequent dramatic challenges shortly after the war as well – and that the usefulness of the measure and the acceptance by the political realm came in the absence of theoretical foundations or scientific deliberations from academia and academics. In light of this, it seems that it will be hard to establish true alternative measures to GDP as they have yet to match its practical usefulness and broad acceptance. This does not preclude the attempts of trying to find alternatives. But it might caution those optimists who believe that presenting numbers that matter alone will lead to politically organized alternative and transformative actions.

The Istanbul Declaration expressed the hope that the felt distrust in numbers and the overall fatigue of some citizens with the workings and processes of Western democracy could be somewhat addressed through broad participatory initiatives of fixing alternative indicators. Even if this aspect seems to have been lost in most of the initiatives, the interplay between numbers that matter and democracy has gotten even more complicated than in 2009. This is due to the rise of not only “fake news,” ideas of “alternative facts,” and “post-truth politics,” but also Big Data and the fact that “numbers that matter” are now collected by monopolistic tech giants rather than official statistical offices. In the United States, a survey has shown that almost 70% of Trump supporters distrusted economic data published by the federal government and it has been claimed that “antipathy to statistics has become one of the hallmarks of the populist right [...] People assume that [...] numbers are manipulated and dislike the elitism of resorting to quantitative evidence” (Guardian 2017). This shows that the question is no longer whether one finds numbers that matter, but whether numbers matter at all. The national initiatives in fixing alternative indicators for well-being are, and will continue to be, interesting research areas in which important observations and experiences can be distilled regarding the interplay between official metrics, narratives of progress, participation and political actions that may well be important in the processes of strengthening a fact-based democracy.

¹⁵ Possibly, the EU wanted to avoid closeness to the title of Herman Daly's anti-growth bible “Beyond Growth. The Economics of Sustainable Development” (Daly 1996).

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