

**UNITED NATIONS STATISTICAL COMMISSION and
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CONFERENCE OF EUROPEAN STATISTICIANS**

**EUROPEAN COMMISSION
STATISTICAL OFFICE OF THE
EUROPEAN COMMUNITIES (EUROSTAT)**

**ORGANISATION FOR ECONOMIC COOPERATION
AND DEVELOPMENT (OECD)
STATISTICS DIRECTORATE**

Joint UNECE/EUROSTAT/OECD Work Session on Statistical Metadata (METIS 2008)
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STATUS REPORT ON METIS AND THE COMMON METADATA FRAMEWORK

Summary of outcomes of related meetings and actions to be taken¹

INTRODUCTION

1. METIS began in the 1980s as part of the UNECE/UNDP Statistical Computing Project. When the projects came to end, the participating national statistical offices shared the opinion that it would be useful to continue exchanging experiences and identifying good practices. Thereafter, the UNECE continued organizing work sessions on statistical metadata every 1-2 years. These are now organized jointly with Eurostat and OECD, and other international organizations actively participate (International Monetary Fund (IMF), Food and Agriculture Organization (FAO), European Central Bank (ECB), and others).
2. In the last decade, METIS was an important forum for discussion of several standardisation initiatives and for the exchange of information between experts. METIS also produced methodological guidelines on data and metadata modelling, on metadata terminology and metadata on the Internet, published by UNECE and the Conference of European Statisticians (<http://www.unece.org/stats/publ.htm>).
3. The participants at METIS 2004 discussed the future way forward. They found that a number of metadata standards were developed by different international organizations for specific purposes, and countries needed a good overview of these standards and their application. Moreover, metadata have grown from simple “data about data” to an important unifying tool across subject matter domains and for all phases of the statistical business process, not only for dissemination purposes. Therefore, participants recommended creating a Common Metadata Framework (CMF) that would be an evolving reference for statistical offices.

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4. The CMF has also helped to streamline METIS work and to defend the importance of METIS vis-à-vis the Conference of European Statisticians and its Bureau. The original purpose of providing a forum for exchange of experience is still of major benefit and importance.

COMMON METADATA FRAMEWORK

5. The Task Force on a Common Metadata Framework (CMF) was established in 2004, with terms of reference approved by the Bureau (CES/BUR.2004/44). The Task Force's objective was to organise available information about statistical metadata into a framework for use by statistical organizations in their development of metadata systems. Based on approved proposals, the framework is structured in four parts:

- A) Corporate Context
- B) Metadata Concepts, Standards, Models and Registries
- C) Metadata and the Statistical Cycle
- D) Implementation

6. The agenda of the METIS session held in April 2006 was based on the four parts above mentioned. In considering how the framework should progress in the future, the Work Session confirmed the relevance of the CMF as an evolving reference to standards, concepts and best practices. Participants also recommended that the CMF editorial board should be open to all inputs from within and outside the METIS framework, ensuring collaboration with other relevant groups.

7. The Bureau reviewed the work of the Task Force after expiration of its mandate in 2007 ([ECE/CES/BUR/2007/FEB/15](#)). The Bureau appreciated the work done to date, and recommended:

- To create a Steering Group on Statistical Metadata (METIS). The Terms of Reference of the Steering Group were approved by the Bureau in October 2007 ([ECE/CES/BUR/2007/OCT/9/Rev.1](#))
- To focus the METIS activities on advocacy for the role and importance of metadata

Action to be taken:

METIS 2008 participants may wish to consider including advocacy-related activities in the METIS work programme, while continuing the exchange of experiences. Advocacy should address the role of metadata in the management of statistical activities, as well as the value metadata bring to subject-matter statisticians and users of statistics.

8. The Bureau also agreed to include a short topic on statistical metadata at the 2008 plenary session of the Conference of European Statisticians. The Bureau emphasised the need to send a strong message about the fundamental importance of metadata to the Heads of statistical offices. The Steering Group on statistical metadata was asked, in this respect, to prepare a background note and a presentation on the role and importance of statistical metadata.

Action to be taken:

A note is being prepared for the 2008 plenary session of the Conference of European Statisticians. In preparing it, the UNECE Secretariat has taken into account comments received from members of the Steering Group.

9. The following progress has been achieved with respect to individual parts of the Common Metadata Framework:

Part A: Parts A of the CMF was reviewed at and following METIS 2006. Part A can be considered as finalised.

Part B: Part B requires continuous updating to reflect new developments in metadata concepts and standards. The terminology is represented by the SDMX Metadata Common Vocabulary (MCV). The MCV may need to be reviewed and extended in its role as a component of the Common Metadata Framework, from the general viewpoint of official statistics. Part B of the CMF should provide more information about the scope and content of existing metadata standards (which standard for what purpose).

Part C: At the invitation of Statistics Austria, a workshop was organized in Vienna on 4-6 July 2007. The workshop focused on pushing forward the work on Part C of the CMF which was, at that time, the least progressed part of the CMF. Part C of the CMF should be further developed. In particular: a template for case studies about metadata and the statistical cycle was developed for the workshop and revised following feedback from participants. New case studies from countries have been prepared for METIS 2008. .

Part D: Part D contains examples of implementation. It should be expanded to refer to the case studies developed for Part C, a summary of lessons learned (to be collated from all case studies and categorised), success stories, best/good practices. More contributions to this should be solicited. Some of the Bureau members considered Part D to be the most important part of the CMF. In any case, Part D is in line with the original purpose of METIS, which is the exchange of experiences.

Actions to be taken:

- **The Steering group should make Part B a comprehensive reference on the field of application of metadata standards – which standard for what purpose;**
- **The UNECE Secretariat will launch and maintain a METIS-wiki hosting CMF documents and, in particular, more case-studies about metadata along the statistical cycle;**
- **The Steering Group shall populate, using input from national statistical offices, Part D with more examples of good practices in metadata systems implementation.**

QUESTIONS ARISING FROM THE METIS WORKSHOP IN 2007

10. There are several classifications for types of metadata (metadata groups) currently in existence. The workshop participants proposed that after further work to clearly define the terms, the following classification should be presented to the METIS Steering Group for consideration and for inclusion into the CMF:

- (i) Survey Metadata
- (ii) Definitional Metadata
- (iii) Methodological Metadata
- (iv) System Metadata
- (v) Operational Metadata
- (vi) Quality metadata

11. This issue is also considered in the paper by Bo Sundgren at METIS 2008 (WP.7). Additional comments on various classifications of metadata are included in the Conference Room Paper CRP.1.

Proposals for progressing in this work, made at the 2007 METIS workshop, included:

- (a) To collect synonyms for types of metadata from the METIS participants, and to add explanatory notes on what is the scope of each category. This was included as a question in the pre-METIS 2008 questionnaire (refer to the results in WP.3).
- (b) To reconcile various classifications (SDMX, Metanet, etc.). This would help to help in the present proliferation of metadata classifications.

12. In general terms, workshop participants were concerned with the possibility of interacting with the SDMX work on content-oriented guidelines and in particular with the review of the Metadata Common Vocabulary, for streamlining some of the existing definitions. Suggestions were put forward on general concepts concerning, for instance, survey methodology and data collection.

13. The definition of a “survey” was discussed, as diverse understandings of this term seem to exist. It was proposed to adopt a common definition for use in METIS materials and meetings, which should combine the original MCV definition with the one used by Statistics Canada:

“Survey: An investigation about the characteristics of a given population by means of collecting data from a sample of that population and estimating their characteristics through the systematic use of statistical methodology. Included are primary sources, such as censuses and sample surveys, and other sources, such as the collection of data from administrative records. Derived statistical activities are also included.”

This proposal will be reviewed by the METIS Steering Group together with a more general contribution to the MCV announced by the UNECE secretariat and described in Room Paper CRP.2.

14. Feedback was collected from the participants during the workshop on the terms they use for describing the different phases of the statistical business process. WP.17 for the present session is dealing with the issue of a generic statistical business process model, proposing a standard terminology which should support the

identification of the different phases and, indirectly, the development of integrated metadata systems.

Actions to be taken:

- **METIS 2008 participants shall try to find a way for a common definition of terms such as “survey”, “data collection”, “statistical activities” and other related terms, either as part of the discussion under topic 2 (ii) or in a written consultation after the work session;**
- **Consider and recommend a classification/typology of statistical metadata as an outcome of discussion of WP.7 under topic 2 (ii);**
- **Comment and make recommendations with respect to the Generic Statistical Business Process Model under topic 2 (iii) (WP.17) taking into account a variety of initiatives being held at national and international level for the standardisation of the statistical life cycle.**

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