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Measuring the Sustainable Development and Building Its Global Indicators: The Methodological Framework

The article elaborates on the methodological framework for measurement of the sustainable development, incorporated in the EU policy and legislation through the strategy for socio-economic development of EU "Europe 2020". The 2030 Agenda on Sustainable Development (referred to hereinafter as the 2030 Agenda), fully conforming to the EU's vision of the future, has become a sustainable development blueprint at global scales. EU member states continue to be leaders in implementing the 2030 Agenda and SDGs with the full compliance with the subsidiarity principle.

The monitoring on the progress on the way to SDGs is carried out by the SDGs nomenclature using open and inclusive approach, with the involvement of EU Council Committees (economics, financial, labor, social protection), the European Statistical Advisory Committee, the European Environment Agency, non-government organizations, other international organizations and research circles. The indicators measuring the progress towards SDGs have been selected in view of their compliance with the EU policy, potentials, accessibility, country coverage, timeliness and quality.

It is emphasized in assessing the regional and sub-regional progress towards SDGs, the United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) uses two main indicators: index of current progress and index of achieved progress. Three main approaches designed for the same purpose, to assess the progress towards SDGs, were analyzed. It was revealed that these approaches provide responses on absolutely different questions. As each method is specific in terms of data set, analytical tools and ways of results' interpretation, each country should make its own choice of the methodology to be used. The notion of "achieved progress" can have many different definitions depending on what dimension is addressed, what goal is set, what comparison is made, how the data are aggregated or how the indicators are selected and used.

Regarding the domestic trends, it is highlighted that the national statistical system of Ukraine jointly with VoxUkraine and with support from the UN Development Program for Ukraine makes assessment of the progress towards SDGs by UNESCAP methodology.

Key words: *sustainable development, Sustainable Development Goals, progress towards SDGs, indicators, assessment, national statistical systems.*

Introduction. A comprehensive analysis of social, economic and environmental issues, to change the technogenic development of the planet for the sustainable one, should be put on top of the human agenda. This problem has by far acquired the universal nature at national and global level: all the countries without exception have been facing the need to change the existing economic paradigm, to

create new concepts of the balanced and sustainable economic development for the elimination of global and regional environmental threats.

The Sustainable Development Agenda till 2030 (referred to hereinafter as the 2030 Agenda) was approved in September 2015 by heads of UN member states and high-profile government officials [1]. The Sustainable Development Goals (SDGs) set out in

the 2030 Agenda are meant to step up the social, economic and environmental progress till 2030 for the benefit of:

- elimination of poverty and famine across the world;
- fighting inequality inside and between the countries;
- building a peaceful and fair society, free from social barriers;
- protection of human rights, promotion of gender equality and empowerment of women and girls;
- reliable preservation of our planet and its natural resources.

Also, SDGs are designed to lay the background for a sustainable, comprehensive and continuous economic growth, a good job for each one with accounting for different levels of national development and capacities.

The 2030 Agenda has provided a collaborative plan of peace and prosperity for humans and the planet for present-day and future alike. It is based on 17 SDGs that call for urgent actions and global partnership of all the countries, developed and developing alike. All the countries acknowledge that the reduction of poverty and other constrains should be part of strategies improving health care and education, eliminating inequality, promoting economic growth, fighting climate change, preserving biodiversity on the planet. It should be noted that the Sustainable Economic Development concept and SDGs definitions are based on results of long-standing international efforts and activities of UN departments, the UN Department of Economic and Social Affairs in particular [2].

The 2030 Agenda offers a new global blueprint for the sustainable development. It is based on 17 SDGs and 169 related targets for the achievement of these SDGs aimed at poverty elimination, protection and prosperity of the world, which is unprecedented in terms of significance and scale.

Having set a wide range of economic, social and environmental targets, SDGs call all the countries to action irrespective of the economic performance. Although SDGs are not legally binding, governments need to take them into consideration and elaborate national measures for their achievement. The progress towards SDGs is being monitored at various levels: global, national, regional and thematic.

The High-Level Political Forum on Sustainable Development (HLPF) is the central UN platform for the monitoring and revision of the 2030 Agenda and SDGs at global level. Therefore, the 2030 Agenda calls UN member states to carry out national reviews of progress towards SDGs. It should be noted that regular reviews of SDGs are voluntary, state-controlled and carried out by both developed and

developing countries in order to establish a platform for partner relations.

Research results. An important prerequisite for monitoring of the progress towards SDGs is a professional approach to it. Within the EU and most of its member states, this effort is taken by the Eurostat [3]. It spearheaded the elaboration of a set of indicators for the assessment of the progress towards SDGs in close cooperation with other commissions, services and organizations of EU member states in the European statistical system.

The sustainable development is incorporated in the EU policy and legislation through the EU Sustainable Development Strategy, EU-2020 Better Regulation Strategy. Also, EU helped form the 2030 Agenda. This document, fully in match with the European vision, has become a global blueprint for sustainable development. EU, together with its member states, is continuing to hold leading positions on the way to the 2030 Agenda and SDGs, with the full observance of the subsidiarity principle [4].

Monitoring of the progress towards SDGs is carried out by the nomenclature of objectives using an open and inclusive approach, with involving the Committees of EU Council (economic, financial, labor, social protection), the European Statistical Advisory Committee, the European Environment Agency, non-government organizations, research circles and other international entities. The indicators measuring the progress towards SDGs have been selected in view of their compliance with the EU policy, potentials, accessibility, country coverage, timeliness and quality. The data are structured by 17 SDGs and cover social, economic, environmental and institutional dimensions of sustainability represented by the 2030 Agenda. Each SDG is measured by five main indicators selected in a way to reflect goals and targets to achieve them. In 2019, of 99 main indicators in the set of SDGs indicators of EU, 37 were multipurpose, being used for the monitoring of several objectives. Of the current SDGs indicators of EU, 55 conform with the UN indicators of SDGs. It was in July 2017 that the UN General Assembly approved the global nomenclature of indicators containing 239 positions.

It needs to be stressed that gaps in the information support exist not only in developing countries, but in developed ones, and filling these gaps requires financial resources, knowledge exchange and investment in human capital.

Since the moment of SDGs adoption and formulation of targets which accomplishment signals the achievement of SDGs, countries of the world have been in search for methods enabling to get a comprehensive response on the question about the progress towards SDGs. This necessitates the elaboration of a methodological framework (or, at least, a monitoring of existing international methodologies) and the selection of a method that

would be the most applicable in view of each country specifics and, therefore, would meet the needs of analysis of the progress towards the national SDGs-related targets. Apart from the choice of a relevant method that would fit for analysis of the progress, it is necessary to choose an approach to the measurement of the progress towards SDGs that would account for this progress in the most vulnerable population groups. The utilization of new approaches based on the availability of disaggregated information flows will allow for a comprehensive measurement and a substantial change in the description of the progress and our understanding of the priorities in SDGs implementation.

Given diverse practices of measuring the progress towards the sustainable development and a complex set of indicators used in the assessment of the progress towards SDGs, the existing approaches need meticulous revisions, with selecting the one capable to deal with vital political issues pertaining to the sustainable development. It should also be noted that SDGs are multidimensional, and any assessment of the progress on their way should be able to reflect all the aspects, in order to be useful for national planning and priority setting. At the same time, the assessment system needs to involve aggregation and transmission of information at various level, in order to encompass all the dimensions of SDGs.

The significance of information support in SDGs setting, assessment and monitoring of the progress towards SDGs cannot be understated, because national statistical systems across the world have taken responsibility for the measurement of performance and progress towards SDGs by (i) producing robust highly aggregated statistics on SDGs indicators; (ii) measuring the progress towards SDGs till 2030.

In spite of a heavy effort in organizing a reliable monitoring of the progress towards SDGs, applications of measurement methodologies are yet to be agreed at international level. This can be explained by the fact that a global monitoring of the progress towards SDGs requires elaborating a complex set of indicators and new tools for their measurement. At national level, issues of selecting the methods that would fit best for monitoring purposes are dealt with by each country in view of its needs. Thus, in Asia and Pacific Rim the progress towards SDGs is assessed on the basis of the global set of indicators found in the 2030 Agenda, approved by the UN General Assembly on July 6, 2017. The estimates for sub-regional and regional indicators are extracted from the statistical online database of the UN Economic and Social Commission for Asia and the Pacific (UNESCAP) [5]. Whenever data are short or missing, supplementary estimates from internationally recognized sources will be used. Details on country grouping and estimation algorithm are given on the website of UNESCAP [6].

It needs to be emphasized that at regional and sub-regional levels, weighted aggregates are substituted by average estimates of indicators, to avoid incomparability with big countries / economies. At the same time, when the sources are to be chosen, the priority will be given to primary sources, to ensure the timeliness of data and minimize the loss of metadata due to using secondary (repeatedly disseminated) statistical information. Therefore, the indicators for information support of global SDGs are selected by the following criteria: the availability of two or more data sources for more than 50% of the countries in a given region or sub-region; the possibility of setting a transparent purpose of the indicators; the metadata for these indicators should be clear and intelligible.

UNESCAP uses two main indicators for the assessment of the regional and sub-regional progress towards SDGs: (i) index of current progress; (ii) index of achieved progress. When estimated, these indices will give the answer on the following questions:

- What progress has been achieved by a country since the year of 2000?
- What is the probability of SDGs achievement till 2030?

It should also be noted that index of achieved progress measures the gap between achieved and target values of an indicator. Both indices are built at the level of sub-indicators (disaggregation or an indicator's sub-component) and aggregated at the level of achieved and target values of an indicator. As regards index of current progress, its values for the year of 2000 and the current year can be used to measure the progress achieved since 2000 and for extrapolation to estimate the progress required to achieve SDGs till 2030.

The abovementioned estimates are derived for each indicator and averaged by targets and goals, to measure the average achieved progress for each goal and objective. Because the indicators are unevenly distributed, they are weighted in proportion to the number of indicators for each goal when aggregating at goal level. This provides the same significance (weight) for each goal. If a country has been progressing since the year of 2000, the average normalized estimate for each goal will be provided by the index varying from 0 to 10. If a country has been regressing, the index will be negative [5].

It should be noted that when the current estimate of an indicator reaches or exceeds the target value, there will be no need in estimating index of current progress, as it will be set automatically as 10.

Ideally, data are available for all the indicators pertaining to each SDG, with index of current progress offering a reliable estimate for all 17 SDGs. But in reality, country data are available for less than 42% of SDGs indicators, with very uneven coverage of SDGs. Because the assessment is sensitive to new indicators, results should be interpreted with caution.

The formula for estimating index of achieved progress P looks as follows:

$$P = \frac{|TV - I_{30}|}{|TV - I_{15}|}, \quad (1)$$

where I_{30} is the expected value of the indicator for 2030; I_{15} is the value of the indicator for 2015; TV is the target value of the indicator for 2030.

That is, regress did not occur if

$$|TV - I_{30}| \leq |TV - I_{15}|. \quad (2)$$

Index of achieved progress is estimated only for the indicators for which the expected value has not achieved the target one (and the achievement of SDG is not expected). For the other indicators it is automatically set as zero. When a progress or no change is expected, the value will vary from 0 to 10; when a regress from the current level is expected, the value will be higher than 10. This index can be interpreted as an additional effort or a boost required for the achievement of SDG, when the value is less or equal to 10.

To avoid the impact of selected indicators, the acceptability threshold, equal to 2% or more, is used in estimating progress or regress in both indices. It means that the change will only be acceptable when the overall change (increase or decrease) in a given period is more than 2% depending on actual or desired vector of change.

The aggregates are usually computed for preset groups of countries, as a sum or an average weighted value, on the condition that a sufficient number of observable data is available at country level. A scheme for data accessibility check is established depending on the type of indicators:

- social and environmental indicators: for any given year for which a total is estimated, countries with observable indicators must account for 2/3 of the population in a group;
- economic indicators: countries with observable indicators must account for 2/3 of the overall gross domestic product in a group.

However, when the abovementioned method is used over time, it may lead to irregularities of the total values due to the lack of some country data over several years (although the rule of 2/3 will be kept anyway). If it is the case, the missing data will be imputed by the following methodology:

- when data are available for an earlier and a later year than the one for which computations are made, the missing value will be imputed by linear interpolation;
- the missing country data for a year that precedes the earliest year for which the value is available is imputed using this available value;
- by analogy, the missing country data for a year following the last year for which the value is available is imputed using this available value;

- for countries that have only one data point over the whole period, this value is used for the rest of years.

Data for other countries are not used to impute missing values. The imputed values are used only in computing totals and derivatives, when over certain years for certain countries data required for computation are missing in basic time series. When the imputation procedure is used in computing aggregates, this will be noticed in the information sheet of metadata.

It should be emphasized that of 169 SDG targets, only 30% have specific target values. As regards the others, target values are set for them by the “champions zone” approach based on the previous situation, which optimize the use of available data. Its idea is that the most reliable available data are identified in a given country, with the average rate of their change set as the target figure for this country. If it is assumed that all the best performers belong to one hypothetical region, it can be referred to as a region-champion, where the rate of change is equal to the average value of one particular indicator for the best performers. Then it can be taken as the target value for a region. It means that if a region as a whole can perform the same way as its champion zone over 15 years (the period of SDGs implementation), then the achievement of the target value should be expected. Eventually, the universal target value for a region can be derived using the rate of change in the champion zone as the average value of the indicator for all the countries for which the data are available.

The main problem of “champions zone” approach may occur when two types of indicators are dealt with: (i) the indicators with lacking data for estimating the rate of change at country level; (ii) the indicators by which most of the countries started with a very low level and could achieve a rapid progress towards SDGs. For the latter indicators, the observable growth rate cannot be meaningfully applied in the future. The two types of indicators require an alternative approach. Instead of using the rate of change, five best performers are identified on the basis of the latest available data. Examples are the share of parliamentary seats taken by women, the share of protected marine areas or the share of population using Internet. These rapid changes might be caused by technological advancement, utilization of available resources or change in the paradigm due to the previous development program (such as the Millennium Development Goals). Then the target value of a region for the “champions zone” will be the average value for the mentioned countries, estimated by use of the highest or the lowest values depending on the sought vector of change: increase or decrease.

The comprehensiveness, accuracy and simplicity cannot be assured without compromises. The assessment of the progress towards SDGs by use of

the extensive nomenclature of 242 indicators requires many assumptions (not always reflecting the reality) and decisions, and striking the balance between the simplicity and the accuracy of results. In the final end, there is no perfect method for measuring the progress towards SDGs. Three main approaches are used today, serving absolutely different purposes and answering very different set of questions. The lack of a transparent methodology and metadata might create an impression that various international organizations offer various responses on the same question of what progress we have achieved or whether or not we will achieve SDGs till 2030.

A careful analysis of various methods shows that they are very different in essence, and if even the same set of data and indicators is used (which is not the case), similar responses should not be expected from different approaches like the following:

- SDSN method: SDGs Index providing the reference point for comparison of a country with rest of the world. For each indicator Index measures the country's distance from its worst value as the share of its total distance to the target value set for 2030. Index does not use time series data at country level. Upper threshold values (target values) for the indicators are based mainly on expert opinions or international commitments (when it is not clearly signified in SDGs), or exceed the best performers by

10% in average. Index can be used rather as a ranking tool than as a measure of the progress;

- UN – ESCAP approach (described above in detail) uses two indicators measuring:
 - the progress achieved by each indicator since 2015 as the ratio to the overall progress which needs to be achieved by a region, in order to conform with the target value for 2030;
 - the expected distance from the target value in 2030 as the share of the total distance that needs to be passed by a region between 2015 and 2030.
- The OECD approach measuring the distance of each indicator from the target value for 2030 (using the approach similar to SDSN) for each country.

The OECD approach involves the same ranking as SDSN method, because both methods give the same estimates in normalization by the scale 0–10. It is static, as it does not account for the rate of progress in each country. This feature is common for SDSN and OECD methods and makes them distinct from the UN approach (ESCAP). However, the OECD approach defines the vector of change by assessing the rate of change in indicators' values over time. A positive correlation shows that a country or a region moves forward in the right direction to achieve the goal, whereas a negative correlation means that a country needs to adjust the course, to achieve the goals (Figure 1).

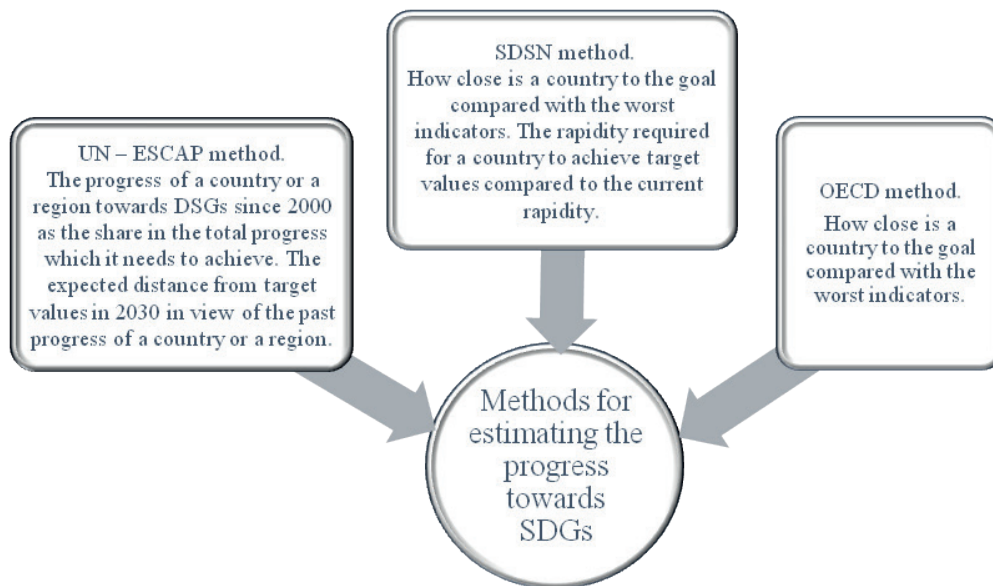


Figure 1. Methods for estimating the progress towards SDGs

Source: constructed by the authors

It should be noted that the common feature of all the above methods is their compliance with the SDGs principle “nobody should be left aside”. The global set of SDGs indicators [7] suggests that they should be broken, when practical, by income, gender, age, race, ethnical belonging, migration status, inclusiveness, geographic location and other criteria. It should also be born in mind that nearly two thirds of the global

SDGs indicators cannot be used for the assessment of the progress due to the lack of data or methodology. Monitoring of the 2030 Agenda will not be feasible unless effort and investment in the production of timely and reliable disaggregated statistics is increased.

The crucial role in providing international data for review and monitoring of SDGs achievement and the

progress towards SDGs and related targets belongs to national statistical systems (NSSs). Two targets of the global SDGs are focused on the improvement of the official statistics:

– Target 17.18: To enhance support for capacity-building in developing countries till 2030, including the least developed countries and small island developing countries, in order to substantially increase the availability of robust, relevant and credible data disaggregated by income, gender, age, race, nationality, migration status, inclusiveness, geographic location and other criteria significant in accounting for national specifics.

– Target 17.19: Based on the current initiatives, to develop other indicators in addition to GDP, to measure the progress towards SDGs, and to help capacity-building in statistics at country level.

It needs to be stressed that the plenary session of the Conference of European Statisticians in 2015 took the decision to launch effort on creating a roadmap for developing official statistics for monitoring of the progress towards SDGs in the region of the United Nations Economic Commission of Europe (UNECE) [8]. In October 2015, the Office of the Conference of European Statisticians established the Steering Group on SDGs statistics for the preparation and implementation of the roadmap, with the following membership: Switzerland (co-chairman), the U.S. (co-chairman), Germany, Denmark, Italy, Canada, Kyrgyzstan, Mexico, the Netherlands, New Zealand, Poland, Moldova, Russian Federation, United Kingdom, Turkey, France, Sweden, Eurostat and OECD. UNECE carries out the functions of the Steering Group's Secretariat.

Current global processes accompanied by the intensifying international cooperation in the sustainable development field caused a specific feature: the unification of principles underlying organization and operation of the statistical system at international level. As mentioned above, NSSs have crucial role in the measurement of the progress towards SDGs. Therefore, the annual Sustainable Development Goals Report prepared by the UN General Secretary in collaboration with the international statistical system, relies on global and regional indicators and data formed by NSSs. Analysis of the progress towards global SDGs and monitoring of the progress at all the levels is made by reported information using the estimates produced under the supervision of countries, and robust, accessible, timely and reliable data [9].

For assessment purposes, it is important to have awareness of the difference between the terms “reporting on SDGs” and “reporting data and statistical information for measuring the progress towards SDGs and its monitoring”. The reporting pertains to monitoring of the progress towards

SDGs and the accomplishment of targets at policy level, i. e. requires the progress assessment in view of the political priorities. An example of this reporting is the Global Report of UN General Secretary to UN High-level Political Forum on Sustainable Development and country reviews of achievements in SDGs.

Official departments in many countries (national coordinating centers, sectoral departments, prime-minister chancellery etc.) coordinate reporting on SDGs, e. g. on respective policy directions. Also, there exist national departments coordinating achievements in particular (individual) SDGs. Quite often national SDGs indicators can be elaborated under the supervision of national departments responsible for coordination of respective policy directions. However, the coordination of SDGs statistics pertaining to measurement (or monitoring) of their achievement is a task of NSSs, because they have access to data sources and methodologies required for compiling statistics relevant to SDGs indicators. Being the coordinator of SDGs statistics, NSSs should closely collaborate with the national policy coordinator. In practice, carrying out of the core coordinating function by NSSs is conditional on their administrative structure (centralized or decentralized), national statistical law and other schemes for collaboration between statisticians and directive bodies.

An effective way of appointing data suppliers in a country is the assessment of readiness for data reporting by each SDGs indicator and finding out data gaps. It means that NSSs, being the entities responsible for data supply for SDGs and monitoring of the progress towards SDGs, need to carry out the following tasks:

- creating national schemes of cooperation;
- assessing the country's readiness to provide data for each global SDGs indicator;
- elaborating national and sub-national indicators;
- capacity-building for SDGs statistics;
- transmitting data on global SDGs indicators.

As regards the measurement of sustainable development in Ukraine, the national statistical system jointly with VoxUkraine and with support from the UN Development Program in Ukraine carries out an assessment of the progress towards SDGs by UNESCAP methodology [5]. The assessment for 2021 included 116 of 183 national SDGs indicators for which the target for 2030 is set. A critical result of these analytical works was setting and distribution of functions between national institutions, and the statement of the need for a dialog with policy makers [9–11].

Conclusions. The authors explored three principal approaches that may appear to have a

similar look and serve the same purpose: to assess the progress towards SDGs. But the analysis showed that these approaches responded on absolutely different questions. Each country makes its own choice of the assessment methodology to be used. The notion “progress achieved” may have many various definitions depending on what dimension is addressed, what objective is set, what kind of comparison is to be performed, what is a required aggregation algorithm, how the indicators are selected and used.

The analysis of objectives and methodologies for the assessment of the sustainable development progress gives grounds for the suggestion that each method involves its specific data set, assessment tools and interpretation of results. Further studies will be focused on defining sustainable objectives and indicators in the national context, using various methodologies and methods for the assessment of the progress towards national SDGs, to ensure a comprehensive analysis required for a robust monitoring of their achievement.

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Методологічні засади вимірювання сталого розвитку та побудови його глобальних індикаторів

У статті висвітлено методологічні засади вимірювання сталого розвитку, включеного до політики та законодавства Європейського Союзу через стратегію соціально-економічного розвитку ЄС “Європа 2020”. Сформований глобальний Порядок денний у сфері сталого розвитку до 2030 року (далі – Порядок денний 2030) повністю відповідає баченню Євросоюзом майбутнього і став світовим планом глобального сталого розвитку. Держави-члени ЄС і надалі залишаються лідерами у виконанні Порядку денного 2030 та ЦСР при повному дотриманні принципу субсидіарності.

Моніторинг досягнення ЦСР проводиться за переліком цілей відкритим та інклюзивним способом із залученням Комітетів Ради ЄС (економічного, фінансового, праці, соціального захисту), Європейського статистичного консультативного комітету, Європейської агенції довкілля, неурядових організацій, інших міжнародних організацій та наукових кіл. Індикатори, що забезпечують виконання завдань ЦСР, обчислені з урахуванням їх відповідності політиці ЄС, перспективності, доступності, охоплення країни, своєчасності та якості.

Акцентовано увагу на тому, що для проведення оцінки регіонального та субрегіонального прогресу у досягненні ЦСР Економічна та соціальна комісія ООН для Азії та Тихого океану (United Nations Economic and Social Commission for Asia and the Pacific, UNESCAP) використовує два основні показники: індекс поточного прогресу та індекс досягнутого прогресу. Авторами розглянуто три основні підходи, які слугують одній і тій самій меті – оцінці прогресу ЦСР. Водночас проведено дослідження показало, що ці підходи відповідають на абсолютно різні запитання. Кожен метод вимагає різного набору даних, передбачає різні інструменти аналізу і зовсім різні способи інтерпретації результатів, а отже, кожна країна робить для себе вибір, яку методологію оцінювання вона буде застосовувати. Дефініція “досягнутий прогрес” може мати багато різних формулювань залежно від того, який вимір розглядається, яка ціль встановлена, яке порівняння проведено, як агрегуються дані, як відбираються та використовуються показники.

Щодо національного розвитку зазначено, що національна статистична система України спільно з VoxUkraine за підтримки Програми розвитку ООН в Україні проводить оцінку прогресу досягнення ЦСР за методологією UNESCAP.

Ключові слова: сталий розвиток, Цілі сталого розвитку, прогрес у досягненні ЦСР, індикатори, оцінка, національні статистичні системи.

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