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METHODS FOR ASSESSING QUALITY OF LIFE: INTERNATIONAL EXPERIENCE

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Abstract

In this paper the quality of life as a multifaceted phenomenon has been studied. The problem of assessment of the quality of life has been investigated. Assessment of quality of life is an important tool for socio-economic policy of any state. Quality of life is defined as the degree of satisfaction of material, cultural and spiritual human needs. Component definitions emphasize the multidimensional nature of this concept and highlight different dimensions of quality of life (objective and subjective). Movement and physical activity is a crucial, fundamental factor in the formation, preservation and strengthening of health and human development.

The purpose is to analyze existing approaches to the assessment of the quality of human life and to summarize international experience.

To assess the quality of life of the population use two approaches, the aim and purpose of which are different. Characterized the international system for the assessment of quality of life. There are several systems of assessment of quality of life: General methodological concept of standards and quality of life (Standard of Living and Quality of Life), the methodology of the Economist Intelligence Unit (the division of The Economist Group), the new European development strategy for the next 10 years – «Europe 2020: Strategy for smart, sustainable and inclusive growth», the methodology of International Living (Ireland), the methodology of the EU, the methodology of the OECD (Organization for economic cooperation and development) in an innovative platform of the Better Life Initiative. These methodologies towards «health» are considering physical activity as the main indicator of the quality of human life.

Strategic management challenges for Ukraine are to improve the quality of life of people in conjunction with the creation of conditions for realization of innovation model of economic growth, achievement and transformation of the high standards of quality of life in a powerful factor of global competitiveness.

Key words: quality of life, approaches the international system of evaluation, indicators, physical activity.

Оксана Шинкарук, Лолита Денисова. Подходы к оценке качества жизни человека: международный опыт. Рассматривается качество жизни человека как многокомпонентное явление и исследуются проблемы оценки качества жизни. Оценка качества жизни населения является важным инструментом социально-экономической политики любого государства. Качество жизни определяется как степень удовлетворения материальных, культурных и духовных потребностей человека. Компонентные определения подчеркивают многомерную природу этого понятия и выделяют различные измерения качества жизни (как объективные, так и субъективные). Двигательная и физическая активность является исключительно важным фундаментальным фактором формирования, сохранения, укрепления здоровья и развития человека.

Цель работы – осуществить анализ существующих подходов к оценке качества жизни человека и обобщить накопленный международный опыт.

Для оценки качества жизни населения используют два подхода, цель и назначение которых различные. Охарактеризованы международные системы оценки качества жизни. Различают несколько систем оценки качества жизни, а именно: общеметодологическую концепцию стандартов и качества жизни (Standard of Living and Quality of Life), методологию Economist Intelligence Unit (подразделения The Economist Group), новую европейскую стратегию развития на следующие 10 лет – «Европа-2020: стратегия разумного, устойчивого и инклюзивного роста», методологию International Living (Ирландия), методологию ЕС, методологию ОЭСР (Организации экономического сотрудничества и развития) на инновационной платформе Better Life Initiative. Указанные методологии в направлении «здоровье» рассматривают физическую активность как основной индикатор качества жизни человека.

Стратегическими управленческими задачами для Украины являются повышение качества жизни людей в сочетании с созданием условий для реализации инновационной модели экономического роста, достижения и преобразования высоких стандартов качества жизни в мощный фактор глобальной конкурентоспособности.

Ключевые слова: качество жизни, подходы, международные системы оценивания, индикаторы, физическая активность.

Introduction. Quality of life is a complex, multi phenomenon that depends on objective factors (in particular, opportunities to meet human needs and interests of given socio-economic conditions) and on various subjective factors (social, psychological, socio-cultural, etc.) [1].

Improving the quality of life serves as a criterion and a necessary condition for human development. The concept of human development emphasizes the priority of human role, determines that the man is the goal of economic growth, not its resource. Human development concept was introduced in the science and the practice of public administration in 1990 [1]. The goal of human development is to create an environment that allows people to live long, healthy and creative lives. The concept of human development, formulated more than two decades ago, has evolved over time. The report on human development during 2015 «Labor in the name of human development» presented an updated definition of human development. The improvements of human development are identified as a main factor in the workplace, which requires the implementation of strategies and policies in three broad areas: creating opportunities in employment, providing the workers' welfare and development of targeted actions [2].

Furthermore, human development aims at including the improvements of life quality. Quality of life reflects the basic prerequisites and degree of implementation of the human development requirements, the priority level of human development in the process of civilization and man's sense of self, identity and status of the environment.

Achieving a high level of human development is impossible without establishing a high quality of life. The existence of restrictions in any of the areas of social life greatly reduces the freedom of choice that is the basis of human development. The removal of restrictions and barriers to participation, activation of the social inclusion processes (inclusion) aim at ensuring the broad opportunities and freedoms – the main policy objectives of human development, the main purpose of which is also to improve the quality of life.

The international community recognized the life quality as one of the main characteristics of the social development of countries. The targets mainly on economic performance and implementation of scientific and technological progress without prioritizing development of the human factor are gradually fading.

The general manager of Eurostat V. Radermakher in the report «Measuring well-being and quality of life», highlighted the high quality of life is impossible without improving the health and ensuring the integration into society, creating a favourable environment and achieving a minimum level of material well-being. He indicated the complexity of the life quality evaluation is associated primarily with the formation of the objective and subjective system of indicators of international and national levels assessment. The general manager of Eurostat, commented on the findings of the Commission on the measurement of economic performance and social progress (Commission Stiglitz-Sen-Fitoussi), emphasized the need to improve the information base that evaluates the quality of life based on the involvement of different sources of information, identifying indicators, which are the most important management decisions. An important task is the coordination and achievement the objectives of sustainable economic growth and protecting the environment, improving the quality of education, health and the increase in physical activity, social infrastructure development, employment and poverty reduction, improving social cohesion and guarantee democratic freedoms in society [14].

Movement and physical activity is extremely important and fundamental factor for formation, preservation, promotion of health and human development.

The purpose is to analyze the existing approaches, which assess the quality of human life and summarize the accumulated international experience.

Discussion and the results of the research. Summarizing the different interpretations of the life quality, researchers distinguish three main types of definitions: global, component and narrow [13].

According to the global definition, quality of life is defined as the degree of the material, cultural and spiritual needs.

Component definitions emphasize the multidimensional nature of the concept and distinguish different dimensions of life quality (both objective and subjective). Under the common position, quality of life does not only characterize the conditions of achievement and satisfaction of conditions (achievements), but also allows to save results. A third approach to determine the quality of life involves the selection of only one or two categories and display specific content of different areas.

The urgency of the problems of life quality assessment is confirmed by the initiatives of international organizations, especially the UN, governments and the expert community. Thus, by the initiative of the President of France, Commission on the measurement of economic progress and social progress was created, whose recommendations are taken into account in planning and monitoring processes. Certain commitments

were taken by the European Commission, including through the establishment of the targets by 2020 in the EU strategy «Europe 2020: a strategy for smart, sustainable and inclusive growth» [4]. Back in 2007, at the conference «Beyond GDP» organized with the European Parliament, the Club of Rome, European Commission, Organization for Economic Cooperation and Development and WWF, new approaches to measuring social progress were declared. In particular, President of European Commission J. Manuel Barroso said that «GDP is certainly very valuable instrument of economic policy, but it may not fully reflect the diversity and seriousness of the problems today». We cannot solve the problem of present and future by the approaches and tools of the past. That is why it is time to move from the limits of GDP.

The organization for Economic Cooperation and Development (OECD) implemented a global project «Assessing social progress» («Measuring the progress of societies»), which aims at raising awareness, mobilizing political support for evaluating the progress and development of key economic, social and environmental indicators. During the meeting the leaders of the «Big Twenty» in Pittsburgh in 2009 particularly emphasized on the absolute necessity of development and practical development of new methods of measuring social progress that take into account the social and environmental aspects in the formation areas for balanced growth [12].

Measurement of social progress was devoted to the work of the World Forum on Statistics, Knowledge and Policy, held in Istanbul in June 2007. 1,200 representatives of governments, business, civil society leaders, academics from 130 countries participated in its work. The outcome of the Forum was the Istanbul Declaration, signed by the European Commission, World Bank, Organization for Economic Cooperation and Development, the United Nations and its many institutions and a number of other international expert groups. The discussion during the Declaration signing identified the necessity to answer such urgent questions [8].

- What to measure? The issue focuses on the need to define what is the object of measurement, conditions, resources or products and results, and the need for a clear vision of factors. And finally – the need to know what to strive for, what is the progress.

- How to measure? The issue focuses on the fact that there are serious methodological problems of measuring progress such as security, human rights, civic participation, participation in public life and some others.

- What are the criteria put in the basis of the measurement process? The issue focuses interest in what should be a priority: assessing the achievements, or conversely the inability to meet the needs; progress or regression; consider how profits and externalities.

- At what level measurement should be organized? The issue calls to determine what level of analysis should prevail: the individual level, the level of the household, family, community, region, country, etc.

- Why to measure? The issue emphasizes the need to determine the hierarchy of objectives for evaluation: evaluation of the impact of public policy evaluation for management decisions, evaluation of strategic planning, evaluation for international comparisons etc.

Assessment of the population quality of life is an important tool for social and economic policy of any state, as it allows: to set benchmarks of social and economic policy in the future; to analyze the current level of socio-economic development; assess poverty; determine the country's place in the global progress; conduct interregional comparison of the level and quality of life [5].

To assess quality of life two approaches are typically used, the goal and purpose of which are different. In the first approach the quality of life assessment conducted for international comparisons of various countries. In the second the quality of life at the country level is assessed for government decision-making about planning of social and economic development [9].

Currently, public and private institutions developed more than 150 welfare composite indicator to assess the effectiveness of the different governments in the economic, social and environmental field on international level. There are over a hundred initiatives to use quality of life in decision-making at national and local level. Performance by which the level and quality of life are estimated at the international level can be divided into quantitative and qualitative, quantitative include gross national product or national income per capita, income and its distribution in society, consumption various material goods according to the classes of goods, employment and so on. Quality indicators include indicators of quality of life conditions, life and human recreation and more.

It should be noted that quantitative indicators are needed to assess the objective aspects of quality of life. However, it is impossible to assess the achievement of social progress only with quantitative (economic) indicators, despite the relative ease of collection and interpretation.

At the moment there is no single approach to assessing the quality of life. The variety of approaches of measuring quality of life summarized in in SET 1.

Set 1

General Characteristics of the International Life Quality Evaluation System

| Title | The Subject Performing Calculation | Calculation Principle | Indicators | Quantity of Covered Countries |
|---|---|--|---|--------------------------------------|
| General methodological concept of standards and quality of life | Scientific and academic community as a whole | Separation of macroeconomic indicators and social indicators | Gross national product per capita, consumer price index consumer basket, expenditures of households GFK basket, poverty, income inequality, life satisfaction and happiness, deprivation, optimism for the future, etc. | Depending on academic tasks |
| EIU index of life quality | Research organization Economic Intelligence Unit | Equivalent consideration of quantitative and subjective indicators | Health, family, social life, financial prosperity, political stability and security, climate, job security, political freedom, gender equality | 111 |
| Methodology EU European Statistical System Committee | European Committee of statistical system | Equivalent consideration of quantitative and subjective indicators | Material living conditions, or basic productive activity, health, education, leisure (recreation) and social communication (interaction) economic and physical security, public administration (government) and the fundamental rights and Nature environment, the general perception of life | |
| Life quality index International Living | Magazine International Living | Equivalent consideration of quantitative and subjective indexes | The cost of living, culture, economy, environment, freedom, health, infrastructure, safety and risk, climate | 190 |
| European Monitoring of life quality | European Foundation for the improvement of living and conditions of labor | A sociological examinations of life quality | Health, employment, deprivation (deprivation) income, education, family, social participation, housing, environment, transport, security, leisure, life satisfaction | 34 |
| Better Life Initiative | OECP | Integral assessment of parameters | Housing, income, employment, education, environment, health, management efficiency, social life, safety, satisfaction with living conditions, the balance between work and leisure time | 34 |

General methodological concept of standards and quality of life (Standard of Living and Quality of Life) is used to assess social progress in different countries. The concept involves the delineation and assessment separate the two elements of social progress, the standard of living and quality of life. According to the concept of standards and quality of life, standard of living component reflects the economic (mainly macro) and other objective indicators [5], while the component of quality of life – mainly sociological indicators or purely social content (often subjective). The above methodology does not have a clear list of indicators used for assessment and arbitrary, while international comparisons it can be used a point and partly [3].

Segment economic indicators including GDP per capita, consumer price index, consumer basket, household expenditures, GFK basket, poverty, income inequality and so on. Subjective indicators – is the degree of life satisfaction and happiness, subjective assessment of their own deprivation, optimism for the future, etc. [10].

Methodology Economist Intelligence Unit (The Economist Group unit) provides an estimate of the quality of life index for 111 countries for the regression model, which is predominantly (80 %) based on the results of sociological polls. Along with subjective assessments of the quality of life obtained in the results of polls respondents of all ages, that ranged satisfaction with different aspects of quality of life on a 5-point scale, this methodology takes into account some objective determinants. Most attention was paid to the calculation of VVP per capita at purchasing power parity. To determine the rating of the country study evaluates the quality of life for nine areas (health, family, social life, well-being for the material basis of political stability and security, climate, job security, political freedom, gender equality) are indirect measurements relevant indicators. These indicators included in the index, and their significance is taken into account in accordance with scales determined on the basis of multifactor regression coefficients.

The new European development strategy for the next 10 years – «Europe 2020: A Strategy for smart, sustainable and inclusive growth», adopted by the European Council in 2010 and based on the analysis of monitoring the quality of life of the EU. Under Strategy 2020 identifies three key areas of growth: smart growth (developing an economy based on knowledge and innovation) Sustainable growth (creating economy that provides sustainable resource use, green economy); Inclusive growth (social inclusion, increase employment, achieve social and territorial coordination). After the conference «Beyond VVP» gradually actualize development issues a set of indicators to analyze the quality of life in EU member states. In 2011, the Committee of European statistical systems (European Statistical System Committee – ESSC) has decided to develop an appropriate set of indicators for EU member states. Currently, only made the first attempt to merge data from multiple sources to measure quality of life in the EU in the following areas: 1) material living conditions; 2) whether the main productive activity; 3) health; 4) education; 5) leisure (recreation) and social communication (interaction); 6) economic and physical security; 7) public administration (government) and fundamental rights; 8) the nature and the environment; 9) general perception of life [12].

Methodology International Living (Ireland) evaluation of quality of life used to study the progress of 190 countries. According to this method, the index of nine areas: 1) subsistence level (cost of living); 2) culture; 3) the economy; 4) the environment; 5) freedom; 6) health; 7) infrastructure; 8) security and risk; 9) the climate. Possible maximum score for each criterion is published annually by 100 world ranking.

EU methodology involves monitoring the quality of life in the EU, the European Foundation for the improvement of living and working conditions (European Foundation for the Improvement of Living and Working Conditions), founded in 2000 (Dublin, Ireland). The organization of the four-year interval collect, analyze, publish and disseminate data on 27 EU Member States and two candidate countries (Croatia and Turkey) 160 indicators that differentiate into 12 groups following areas: 1) health; 2) employment; 3) revenues; 4) education; 5) family; 6) public life; 7) housing; 8) environment; 9) transport; 10) safety; 11) rest; 12) life satisfaction [12].

Monitoring the quality of life in the EU based on subjective assessments and is an alternative source of information, as complementary objective assessment based on data from Eurostat. EC concerning statistics on income and living conditions (European Union Statistics on Income and Living Conditions, EU-SILC) is used to assess the quality and standard of living, to make interstate comparisons, compare best practices and measure social progress. This social inclusion is one of the priority areas of EU policy, as the quality of life affects dissatisfaction with life annexations social groups [12].

The methodology of OECD (Organization for Economic Cooperation and Development) is based on an innovative platform Better Life Initiative, presenting the results of the evaluation of quality of life directly to the citizens of 34 countries online 11 main areas: 1) income; 2) work; 3) balance of work and rest; 4) health; 5) education; 6) housing; 7) community; 8) participation in public life; 9) the environment; 10) security; 11) life satisfaction. The above methodology involves designing individual quality of life index each respondent who agreed to participate in an interactive survey [6]. The most important achievement developers of interactive survey Better Life Initiative creation can be considered adequate, accessible and comparable database users, enabling a better understanding of the factors influencing the quality of living.

These methodologies towards «health» view physical activity as the primary indicator of quality of life.

Until now evaluating the quality of life in Ukraine neglected. However, the inclusion of the agenda of the central authorities issues of quality of life, the creation of the Coordinating Council on quality and safety of human life (according to the Cabinet of Ministers of Ukraine of 26 December 2011 r. Number 1393) suggests a strengthening of the state to the issues of appropriate quality life and implementation of constitutional rights [7]. According to the Human Development Report for 2015 «Labor in the name of human development» Ukraine ranks 81 among 188 countries in the ranking of countries on the Human Development Index (HDI) 2014 [2].

Monitoring implementation tasks improving quality of life can be achieved by using the existing system of evaluation indicators, development of methodological approaches to measuring quality of life. This will determine the most problematic areas and take effective management decisions to improve the quality of life at the national level.

Conclusions and prospects for further research. Improving the quality of life combined with the creation of appropriate conditions for the implementation of an innovative model of economic growth, transformation and achieve high standards of quality of life in a powerful factor in global competitiveness Ukraine are strategic management tasks.

Identifying the main components and factors affecting the quality of life, the formation of quality of life management strategies will ensure harmonization objectives of economic growth, human development and environmental conservation. Physical activity occupies an important place in the direction of «health» in the system of assessing the quality of life of various international methodologies and approaches and requires further research.

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