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ADVANCED INTERNATIONAL PRACTICES IN DIAGNOSING AND FORECASTING SOCIAL STRATIFICATION PROCESSES: EVIDENCE FROM THE YEARS 2022–2026 AND IMPLICATIONS FOR UZBEKISTAN

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Abstract. This article presents a comparative analysis of international practices in diagnosing and forecasting social stratification processes. The analysis is based on reports of international organisations, official statistical releases and peer-reviewed studies published in the years 2022–2026. It examines the OECD measure of inequality of opportunity, the local-level Social Mobility Index of the United Kingdom, the use of linked administrative records and large-scale social network data in the United States, the microsimulation-based flash estimates of poverty and inequality produced by Eurostat, and the World Bank Poverty and Inequality Platform. The findings show that current practice rests on three interrelated components: comparable measures of opportunity and mobility, frequent and linked microdata, and models that estimate indicators before survey results become available. The existing monitoring base in Uzbekistan, comprising the annual household budget survey used for the official poverty measure and the monthly World Bank survey of citizens, is assessed as a starting point for adopting these instruments, and directions for their application in national practice are proposed.

Keywords: social stratification; diagnosis; forecasting; social mobility; inequality of opportunity; nowcasting; microsimulation; poverty monitoring; Uzbekistan.

1. Introduction

Social stratification denotes the stable structure through which resources, opportunities and status are distributed in a society. Diagnosing stratification processes means measuring the composition of social strata at a given point in time, the size of the gaps between them and the intensity of movement across them. Forecasting means estimating how these indicators are likely to change under the influence of economic growth, demographic dynamics and public policy. Both tasks depend on reliable data, comparable classification criteria and validated modelling methods.

International practice in this field has changed considerably since the year 2022. In the year 2022 the OECD established the Observatory on Social Mobility and Equal Opportunity, and in September 2025 it published a flagship report introducing a new comparable measure of inequality of opportunity (OECD, 2025). Eurostat now publishes microsimulation-based flash estimates of poverty and inequality about one year before the corresponding survey data (Eurostat, 2026a). In June 2025 the World Bank revised its international poverty lines on the basis of the 2021 purchasing power

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parities (PPPs) and extended its estimates to the year 2025 by means of nowcasting (World Bank, 2025a). The Sustainable Development Goals Report 2025 notes that this revision drew on updated price data and national poverty lines from more than 160 countries, and that only one in five countries is on track to halve its national poverty rate by the year 2030 (United Nations, 2025). Accurate diagnosis and timely forecasting of stratification have therefore become a practical requirement of social policy rather than solely a research task.

These developments are directly relevant to Uzbekistan, where the official poverty rate fell from 14% to 11% in the year 2023, to 8.9% in the year 2024 and to 5.8% in the year 2025 (Center for Economic Research and Reforms [CERR], 2025b). Change of this pace calls for monitoring not only of the poverty headcount but also of the structure of social strata and of mobility between them. The purpose of this article is to systematise the most recent international practices in diagnosing and forecasting stratification processes and to identify directions for their application in Uzbekistan.

2. Materials and Methods

The study employs comparative analysis, document analysis and secondary analysis of published data. The source base was restricted to materials released in the years 2022–2026: flagship reports of the OECD and the World Bank; official releases of Eurostat and the European Commission Joint Research Centre (JRC); the statutory annual report of the UK Social Mobility Commission; peer-reviewed articles and working papers of the Opportunity Insights research group; and official information on poverty assessment in Uzbekistan. Each practice was assessed against three criteria: the type of diagnostic instrument, the data source and its frequency, and the capacity of the instrument to support forecasting.

The analysis distinguishes several concepts used in current practice. Absolute mobility is the share of people whose income, education or occupational status exceeds that of their parents at the same age. Relative mobility is the extent to which a person's position in a distribution depends on the position of his or her parents. Inequality of opportunity is the part of inequality in outcomes that can be explained by circumstances such as parental background, sex or place of birth. Nowcasting is the estimation of the current value of an indicator before the corresponding survey data become available, whereas forecasting is the projection of its future values under specified assumptions. These distinctions determine which data are required and which policy questions each instrument can address.

3. Results

3.1. Measuring inequality of opportunity

The OECD report To Have and Have Not develops a measure that separates inequality arising from circumstances beyond an individual's control from inequality associated with effort and choice, and applies it to 29 member and 3 accession countries. According to the report, on average at least 25% of total inequality in market income can be attributed to inherited circumstances. In most countries parental background accounts for more than 60% of the inequality of opportunity observed at household level, and in some countries for more than 75% (OECD, 2025). The report is the seventh in the OECD series of flagship publications on inequality, which began with Growing Unequal? in the year 2008, and the first to be released under the Observatory on Social Mobility and Equal

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Opportunity. It complements rather than replaces conventional measures of intergenerational mobility. The report also analyses geographic disparities in access to education, employment and essential services, treating place of birth and residence as a distinct dimension of stratification. For diagnostic purposes, the value of the measure lies in showing which part of existing inequality is reproduced across generations and therefore requires policy attention.

3.2. Territorial diagnosis of social mobility

The UK Social Mobility Commission, a statutory body that reports to Parliament, published its State of the Nation 2025 report on 18 December 2025. The report draws on data on occupation, income, education, housing and wealth and applies the Social Mobility Index at the level of local authorities (Social Mobility Commission, 2025). Among its findings, 48.2% of people aged 25–29 were in professional occupations in the years 2022–2024, compared with 36.1% in the years 2014–2016; however, people from lower socio-economic backgrounds benefited from this expansion less than their peers. The report identifies pronounced regional disparities, with former industrial and mining areas experiencing persistent disadvantage. It also contains international comparisons, according to which the United Kingdom compares favourably with Canada, Denmark and the United States in absolute income mobility, while a child's educational attainment still depends heavily on parental background. All indicators are published through an open interactive data explorer, which enables local authorities to use the diagnosis in planning. This practice illustrates the shift from national averages to territorial diagnosis of stratification.

3.3. Linked administrative records and large-scale social data

Research based on linked administrative records has substantially increased the precision of mobility measurement. Using data on 57 million children, Chetty et al. (2024) found that, for white children in the United States born in the years 1978–1992, earnings rose among those from high-income families and fell among those from low-income families, widening the earnings gap by parental income by 30%. Over the same period, the earnings of Black children increased at all levels of parental income, narrowing the white–Black gap for children from low-income families by 30%; similar patterns were observed for educational attainment, test scores and mortality. Using a quasi-experimental design, the authors attribute these trends to changes in parental employment rates within local communities and conclude that community-level changes in one generation can propagate to the next. This finding has direct implications for forecasting: indicators describing the current environment of children can serve as leading indicators of future stratification.

A second line of research relies on large-scale social network data. Drawing on 21 billion friendships among 72.2 million Facebook users aged 25–44, Chetty et al. (2022) measured three types of social capital by postal code. Economic connectedness, defined as the share of high-status friends among people of low socio-economic status, proved to be among the strongest predictors of upward income mobility identified to date, whereas measures of social cohesion and civic engagement were not strongly associated with mobility. This approach extends the diagnosis of stratification from economic resources to the structure of social ties.

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3.4. Forecasting and nowcasting instruments

Survey-based income statistics are published with a delay because they refer to income received in the previous year. To reduce this delay, Eurostat produces experimental flash estimates by means of the EUROMOD tax-benefit microsimulation model, current labour market data and the up-to-date tax and benefit rules of each member state (European Commission Joint Research Centre [JRC], 2026). According to EU-SILC 2025, which refers to income in the year 2024, 72.4 million people, or 16.3% of the population of the European Union, were at risk of poverty. The flash estimates for income in the year 2025, published in May 2026, indicated a statistically non-significant increase in this rate to 16.4% (Eurostat, 2026a), a nominal rise in median income of about 3.5%, a real rise of 1.2%, and stable income inequality as measured by the S80/S20 ratio (JRC, 2026). The corresponding survey results are scheduled for release in April 2027 (Eurostat, 2026b). Since the year 2021 EU-SILC has been conducted under Regulation (EU) 2019/1700, which established a common framework for European statistics relating to persons and households (European Parliament & Council of the European Union, 2019).

At the global level, the June 2025 update of the World Bank Poverty and Inequality Platform (PIP) adopted the 2021 PPPs and revised the international poverty lines to $3.00, $4.20 and $8.30 per person per day; estimates for the years 2024 and 2025 are nowcasts (World Bank, 2025a). The principal instruments reviewed are summarised in Table 1.

Table 1

Current international instruments for diagnosing and forecasting social stratification

Instrument	Institution, latest release	Function in diagnosis and forecasting
Inequality of opportunity measure	OECD, September 2025	Share of income inequality attributable to circumstances beyond individual control; comparable across 32 countries
Social Mobility Index	Social Mobility Commission (UK), December 2025	Local-authority diagnosis based on occupation, income, education, housing and wealth; open data explorer
Linked administrative records	Opportunity Insights and U.S. Census Bureau, July 2024	Intergenerational mobility trends for 57 million children by parental income and community
Economic connectedness	Opportunity Insights, August 2022	Cross-class social ties measured from 21 billion friendships as a predictor of upward mobility
EU-SILC under Regulation (EU)	Eurostat, EU-SILC 2025 wave, 2026	Harmonised income, poverty and social exclusion indicators for EU member states

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Instrument	Institution, latest release	Function in diagnosis and forecasting
2019/1700	release	
Flash estimates (EUROMOD)	Eurostat and JRC, May 2026	Microsimulation-based estimates of poverty and inequality about one year ahead of survey results
Poverty and Inequality Platform	World Bank, June 2025	International poverty lines in 2021 PPPs; nowcasts for the years 2024–2025; country profiles, including Uzbekistan

Source: compiled by the author from OECD (2025), Social Mobility Commission (2025), Chetty et al. (2022, 2024), Eurostat (2026a), JRC (2026) and World Bank (2025a).

3.5. Common methodological trends

A comparison of the practices reviewed reveals five common trends. First, diagnosis is becoming multidimensional: income is analysed together with education, occupation, housing, wealth and social ties. Second, cross-sectional surveys are increasingly complemented by linked administrative and longitudinal data, which make it possible to observe movement between strata rather than only their size. Third, the interval between the reference period and the publication of indicators is being shortened through microsimulation and nowcasting. Fourth, the unit of analysis is moving from the national level to regions, local authorities and communities, where the mechanisms of mobility operate. Fifth, indicators and anonymised microdata are published in open formats, which allows independent verification and wider use in research and local planning.

3.6. The current monitoring base in Uzbekistan

Since the year 2020 poverty in Uzbekistan has been assessed regularly on the basis of a household budget survey conducted by the national statistical authority in cooperation with the World Bank; the survey currently covers about 16,000 households (CERR, 2025b). According to the assessment for the year 2025, the poverty rate declined to 5.8%, which is 3.1 percentage points lower than in the previous year; urban poverty fell to 5.2% from 8.6%, rural poverty to 6.4% from 9.2%, and the number of people living below the national poverty line is estimated at 2.2 million (CERR, 2025b). Internationally comparable estimates for Uzbekistan are published on the World Bank PIP country profile, which reports for the year 2025 a poverty rate of 2.3% at the $3.00 line and a Gini index of 32.66 (World Bank, n.d.). In addition, the World Bank has conducted the Listening to the Citizens of Uzbekistan (L2CU) survey since the year 2018: about 1,500 households are interviewed by telephone every month on income, employment, migration, access to public services and perceptions of reforms, and the anonymised microdata are available through the World Bank Microdata Library (World Bank, 2025b).

Official data also permit an initial diagnosis of the structure of household income. In the year 2024 real per capita household income grew by 10.7% and reached an average of 2.1 million soums per month. Wages accounted for 42.6% of household income (41.9% in the year 2023),

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entrepreneurial income for 22.9% (21.4%), pensions, social assistance and subsidies for 18.2% (18.9%), agricultural and household plot income for 10.7% (9.8%), and remittances from abroad for 2.0% (3.1%) (CERR, 2025a). The growing share of labour and entrepreneurial income indicates that changes in the position of households are increasingly driven by the labour market rather than by transfers. In the year 2025 the largest numbers of people below the poverty line were recorded in the Samarkand (265,000), Fergana (239,000), Kashkadarya (238,000) and Andijan (214,000) regions (CERR, 2025b), which points to the need for territorial rather than exclusively national diagnosis.

4. Discussion

The review shows that current international practice does not rely on a single indicator. It combines measures that separate inherited from individual factors, territorial diagnosis, linked microdata and models that provide estimates ahead of survey results. The monitoring base of Uzbekistan already contains two of the required elements: an annual household budget survey used for the official poverty measure and a high-frequency panel survey. On this basis, the following directions are proposed:

1) including questions on parental education and occupation in the national household budget survey, which would allow inequality of opportunity to be estimated in accordance with the OECD methodology;
2) developing a district-level social mobility index and publishing it through an open data explorer, following the practice of the United Kingdom;
3) linking anonymised administrative records in the fields of taxation, employment and social protection for research purposes, subject to appropriate data protection safeguards;
4) building a national tax-benefit microsimulation model to estimate the distributional effects of policy measures and to produce flash estimates of poverty before survey results are released;
5) including internationally comparable indicators, such as poverty rates at the World Bank lines and the Gini index, in national statistical releases alongside the national poverty rate.

These measures could be organised as a three-level monitoring framework. The first level would comprise annual structural indicators: the poverty rate, income inequality ratios and the share of inequality attributable to circumstances. The second level would provide territorial diagnosis at regional and district level. The third level would combine high-frequency survey data, such as those of L2CU, with microsimulation-based flash estimates, making it possible to assess the direction of change within the current year. Such a framework would link the diagnosis of the present structure of social strata with the forecasting of its likely evolution.

The limitations of these instruments should also be taken into account. Linked administrative records require a legal framework for data access and protection. Measures derived from social media reflect only the population of platform users and cannot replace representative surveys. Flash estimates are experimental, and their accuracy depends on the quality of the underlying microdata and on the assumptions made about labour market dynamics.

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5. Conclusion

International practice in the years 2022–2026 shows that diagnosing and forecasting stratification processes rests on three interrelated components: comparable measures of opportunity and mobility, frequent and linked microdata, and microsimulation models that estimate indicators before survey data become available. The OECD, Eurostat, the World Bank and national institutions in the United Kingdom and the United States apply these components as an integrated system. In Uzbekistan, the existing poverty assessment and the L2CU survey provide a basis for introducing these instruments gradually. Measuring inequality of opportunity, conducting territorial diagnosis and applying microsimulation-based forecasting would enable the monitoring of stratification to move from recording outcomes to anticipating them.

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