

## Taxonomy Oversight Group (TOG) - Taxonomy Evaluation Document

### RAG Status Explanation

- **Green** – on schedule for the milestone to be met.
- **Amber** – challenges exist, but they are realistically manageable, and the milestone should be met.
- **Red** – the milestone will not be met or are unlikely to be met
- **Blue** – Complete
- **Black** – not started

Named Taxonomy	Standard Occupational Classification (SOC)	
<b>Background</b>	The current Standard Occupational Classification 2020 (SOC) is a common classification of occupational information for the UK. SOC is widely used in official statistics and has users across government and other organisations. In 1990 SOC was developed as a single, standard classification to replace several incompatible classification systems.	
<b>Task Group</b>	Skills	
	RAG	Go to Green action required
1. Definition  A taxonomy is the process of naming and classifying items into groups within a larger system according to their similarities and differences. The resulting structure of terms which can be either flat or hierarchical in nature, is used to provide a conceptual framework	SOC is hierarchical in structure and is used to classify occupations (jobs) by skill level and specialisation. Skill levels are approximated by the length of time necessary for a person to become fully competent in the performance of the tasks associated with a job, including training and qualifications. SOC	

for discussion, analysis or information retrieval.

2020 is categorised into four skill levels.

See [section 2](#) for more information on skill levels

2. Purpose

There must be clarity about the role of the taxonomy in a specific circumstance. What is the problem that the taxonomy is trying to resolve? A good taxonomy should be built with the end user in mind. It must be up-to-date, relevant and sufficiently detailed to be fit for purpose. If end users find that the taxonomy fails to meet their requirements, they may amend or substitute categories for their own purposes, thereby reducing the overall comparability and relevance of the taxonomy.

SOC is used to classify occupations to most sources of occupational statistics in the UK. SOC 2020 is also used by other organisations for their own purposes.

3. Complexity

The level of complexity must adequately reflect end user requirements with challenge given to any additional level of detail within the taxonomy that doesn't have a compelling purpose. An unnecessarily

Some existing users of SOC have expressed that the existing structure, with the lowest level being 4 digits, is not sufficiently granular to meet their needs. More information on the SOC-extension project is available [here](#).

Whilst the current 4 digit SOC structure will continue to meet the needs of many, there is also an additional layer of detail being developed as part of the SOC Extension Project. This new structure remains experimental in nature and will increase the number of unit groups from the current 412 to 1,463.

<p>complex taxonomy has the potential to negatively impact adoption.</p> <p>“Everything should be made as simple as possible, but no simpler.” (Einstein)</p>		
<p>4. Balance</p> <p>Does the taxonomy have a sense of balance? If some high-level groupings have just two or three sub-categories whilst other have considerably more, this could reflect user need or may be a sign that the balance of the taxonomy requires further consideration. Exceptions to this may include e.g. Country, and other unambiguous long lists which can be presented alphabetically. Care must also be taken to ensure that there are no ‘empty’ categories within the taxonomy.</p>	<p>SOC has a hierarchical structure. For SOC 2020, at the most detailed level there are 412 unit groups (4 digits). Each unit group sits within a minor group (3 digits) of which there are 104, then 26 sub-major group (2 digits). Major groups (1 digit) are the highest level of the structure, of which there are 9.</p> <p>Some minor groups in SOC 2020 contain more unit groups than others (range is from 1 to 9 unit groups). This is necessary because occupations are grouped together as outlined in section 1 above and evidenced from large banks of occupational data used as part of the revision process.</p>	
<p>5. Ownership and Governance</p> <p>There must be a clear owner of the taxonomy and governance policies in place for maintaining</p>	<p>SOC is owned by the Office for National Statistics (ONS). The Classifications Branch within ONS</p>	

<p>and updating the structure. It is the responsibility of the owner or custodian to maintain the classification in line with any agreed national or international process for revision, update and amendment. This responsibility includes maintaining any supporting materials associated with the taxonomy. Governance policies should define who does which tasks, procedures for performing tasks, and feedback mechanisms for suggesting changes and improvements.</p>	<p>is responsibility for its revision every 10 years.</p> <p>Queries regarding SOC revisions can be made by contacting <a href="mailto:socrevision@ons.gov.uk">socrevision@ons.gov.uk</a></p>	
<p>6. Accessibility The taxonomy and supporting materials must be hosted in an appropriate location with clear sign posting to direct users to its location. It should be available in accessible downloadable formats that are suitable for user needs. Materials should be provided in plain English and use language appropriate to user needs.</p>	<p>SOC is published on the ONS website and are available to download in excel or csv format from <a href="#">this page</a>.</p>	
<p>7. Interoperability The taxonomy must, where possible, adopt/align to existing</p>	<p>The major group structure is a set of broad occupational categories which are designed to bring</p>	

national and international standards. A new taxonomy should have the ability to map to existing sources enabling the accurate, effective, and consistent exchange of data between sources. Detail should also be provided where any instances of overlap with alternative taxonomies occur.

together groups which are similar in terms of qualifications, training, skills and experience. These categories aim to align SOC as far as possible with the International Standard Classification of Occupations (ISCO).  
[SOC Volume 2](#) – the coding index maps directly to ISCO08 by job title

8. Supported  
The taxonomy should be supported by additional materials such as detailed scope notes. This will ensure that new terms that are synonyms for existing categories are correctly recorded and not otherwise added as new categories. A single term with a definition overlapping that of another term, or a misplaced hierarchy, can disrupt the whole taxonomy. Therefore, no new

SOC is supported by the three volumes:  

- SOC 2020 Volume 1: structure and descriptions of unit groups. Outlines the background, resources, concepts and processes of SOC 2020.
- SOC 2020 Volume 2: the coding index. Provides the coding index and coding rules and conventions for SOC 2020

And

term should be added to a taxonomy without a formal approval or review process.

- SOC 2020 Volume 3: the National Statistics Socio-economic Classification (NS-SEC rebased on the SOC 2020). NS-SEC has been constructed to measure the employment relations and conditions of occupations.

Volume 3 is derived from SOC.

Information on these 3 volumes can be found [here](#).

#### 9. Well defined terms

The terms within the taxonomy should strive to be unambiguous and mutually exclusive. The taxonomy must also provide a structured way of handling terms that do not fit into a prescribed category. This includes the provision of adequate space in which to attribute those entries classified as n.e.c. (not elsewhere classified) or n.o.s. (not otherwise specified). Failure to do so may result in an inability

SOC includes 44 n.e.c. (not elsewhere classified) unit groups to handle occupations that do not fit into a prescribed category.

<p>to assign data or an unmanageable 'miscellaneous' category containing dissimilar entries.</p>		
<p>10. Revision and Maintenance A successful taxonomy must have a regular revision and maintenance process in place. This must be undertaken in a timely manner to account for change. An ongoing commitment of resources will be required to ensure that it remains relevant and fit for purpose. All changes should go through a defined review process. There should be no ad-hoc or knee jerk reactions to user requests for changes to the taxonomy. Any and all changes must be clearly labelled and communicated to enable accurate cross reference.</p>	<p>SOC is revised every 10 years, where a consultation exercise is conducted engaging stakeholders from private organisations &amp; individuals; and from across Government.</p> <p>A SOC Steering Group is created from key stakeholders, ONS and experts in the labour market. The SOC Steering Group signs off interim changes to the SOC structure and the final version.</p> <p>SOC Volume 1 and 2 are periodically updated to include new job titles to the SOC index and the unit group descriptions are updated when necessary.</p>	
<p>11. Metadata Metadata is a set of data that describes and gives information about other data. It is crucial that appropriate metadata is recorded about the taxonomy.</p>	<p>The <a href="#">SOC index</a> includes a 'FILE SPEC' tab that includes information on the excel workbook.</p>	

Metadata provides a structured reference and can cover a wide range of topics. Typical examples would be: Title, Subject, Description, Coverage, Date, Creator, Format etc.

Further information, including publication dates can be found in the 'INFO' tab

Updates to the SOC index are included in the 'SOC2020 coding index V#' tab, with additions to the index noted in the 'NEW' column, and amendments noted in the 'CHANGE' column.

Stakeholders are informed when updates are made to the SOC index.

12. Methodology  
The method by which a taxonomy was derived must be freely available to users. Open code used to inform the taxonomy should be made available where possible as should details of individuals that contributed via committee to the taxonomy development.

Methodology on how the current SOC 2020 is available from [SOC 2020 Volume 1 - structure and descriptions of unit groups](#). This page outlines the background, resources, concepts, and processes of creating SOC 2020.

ONS publish tables showing the relationship between the previous and new classification. The current relationship tables for SOC2010 and SOC2020; and user guide are available from [here](#).



	<p>The method for creating the relationship tables was quality assured by ONS Methodology.</p>	
<p>13. Engagement Strategy There must be a clear strategy in place to provide users with adequate opportunity to contribute to the revision cycle and communicate any changes in the taxonomy. All users should be made aware of the review or revision process and encouraged to participate in any stakeholder engagement. Updates must be provided regularly and should include details of any 'New Terms', 'Deleted Terms', 'Merged Terms', and 'Split Terms'. Any changes to the structure, content or methodology of the taxonomy should be communicated as early as possible to allow users sufficient time to prepare for implementation.</p>	<p>As part of the SOC revision process the Classification branch engage with stakeholders and who gather information on proposed changes to SOC</p> <p>Details of the revision are published on-line for the duration of the revision and are circulated to stakeholders by regular updates via email. Changes that are not possible are also communicated to stakeholders.</p> <p>Stakeholders are advised on publication day when a new SOC is published to allow time for implementation.</p>	
<p>14. Future Proof Over time new content will</p>	<p>The Classification Branch has a process in place to record new</p>	

appear which will need to be assimilated into the taxonomy. A successful taxonomy must have the scope to incorporate new or emerging elements. Without sufficient forward planning in place the original, well-structured taxonomy may quickly become outdates. Careful consideration of each of the principles outlined, alongside expert, topic-specific knowledge will help to ensure the long-term effectiveness of the taxonomy.

and emerging job titles to include periodically in SOC Volume 2 – the coding index.

Information on emerging occupational areas that could result in changes to the SOC structure is recorded on a database ready for the next revision cycle.

ONS welcomes information on new or emerging occupational areas.

Contact  
occupation.information@ons.gov.uk

**Final decision and recommendations:**

TOG agreed to endorse SOC at its meeting on 16<sup>th</sup> March 2022.

**Date:**