



EUROPEAN COMMISSION  
EUROSTAT

Directorate F: Social and information society statistics  
**Unit F-3: Living conditions and social protection**



**Doc. LC 61/11/EN**  
**rev.1**

**2009 COMPARATIVE EU  
INTERMEDIATE QUALITY REPORT**

Version 3 –July 2011

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## INTRODUCTION

EU-SILC is a multi-dimensional instrument focused on the income and the living conditions of different types of households as well as on the housing, labour, health, demography, education and deprivation issues.

After having started on the basis of a gentlemen's agreement in 2003 in seven countries (Belgium, Denmark, Greece, Ireland, Luxembourg, Austria and Norway), the EU-SILC instrument was implemented by means of a legal basis, which was adopted in 2003 and gradually implemented from 2004 onwards. It is now the main reference source for the headline target on poverty of the Europe 2020 strategy, for statistics on income and living conditions and for social inclusion indicators both at national and at the European level.

The regulation establishing the EU-SILC with provisions on survey design, survey characteristics, data transmission, publication and decision process is the Framework Regulation EC N°1177/2003. According to article 16 of this Framework Regulation:

- 1. Member States shall produce by the end of the year N+1 an intermediate quality report relating to the common cross-sectional EU indicators based on the cross-sectional component of year N. [...]*
- 2. The Commission (Eurostat) shall produce by the end of June N+2 a comparative intermediate quality report relating to the common cross-sectional EU indicators of year N. [...]*

The Comparative EU Intermediate quality report consequently aims at summarizing all the information contained in the national intermediate quality reports<sup>1</sup> that countries sent to Eurostat, with the final objective of evaluating the quality of the instrument from a European point of view. This is done by establishing cross-country comparisons in some of its key quality dimensions: accuracy, comparability and coherence.

In 2009, the EU-SILC instrument covered 31 countries, that is, all EU Member States plus Iceland, Turkey, Norway and Switzerland. At the time of writing this document, Ireland, Turkey and Switzerland did not deliver their 2009 Intermediate National Quality Report to Eurostat.

The outline followed in this document is the one specified in the Commission Regulation N° 28/2004 (Annex IV) about the detailed content of intermediate quality reports to be produced by Eurostat, taking also into account the ESQR<sup>2</sup> recommendations.

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<sup>1</sup> The EU quality reports, as well as most of the national quality reports (subject to agreement from the national statistical authorities), are publicly available on Eurostat website ([http://epp.eurostat.ec.europa.eu/portal/page/portal/income\\_social\\_inclusion\\_living\\_conditions/quality](http://epp.eurostat.ec.europa.eu/portal/page/portal/income_social_inclusion_living_conditions/quality)).

<sup>2</sup> ESS Standard for Quality Reports

## **1. ACCURACY**

The concept of accuracy refers to the reliability of estimates computed from a sample rather than the entire population, in other terms it is the degree of closeness of estimates to the true values. Estimates are not equal to the true values because of variability and bias. There are mainly two sources of bias: sampling errors and non sampling errors.

This section dwells on methodological features of the EU-SILC samples surveyed in each country and intends to draw a picture of their relevance for estimation purposes. In details, it deals with the sampling design, sampling and non-sampling errors, mode of data collection and the interview duration.

### **1.1. Sample design**

According to the information provided by countries in their national quality report, this section provides an overview of the main sampling design characteristics. More details on this topic are available to readers in annex 2 which presents the information country by country in a systematic way.

#### *Type of sampling design and sampling unit*

Although one characteristic of EU-SILC is flexibility in terms of sampling design, Eurostat has recommended a rotational design with 4 sub-samples or replications (see box 1 hereafter).

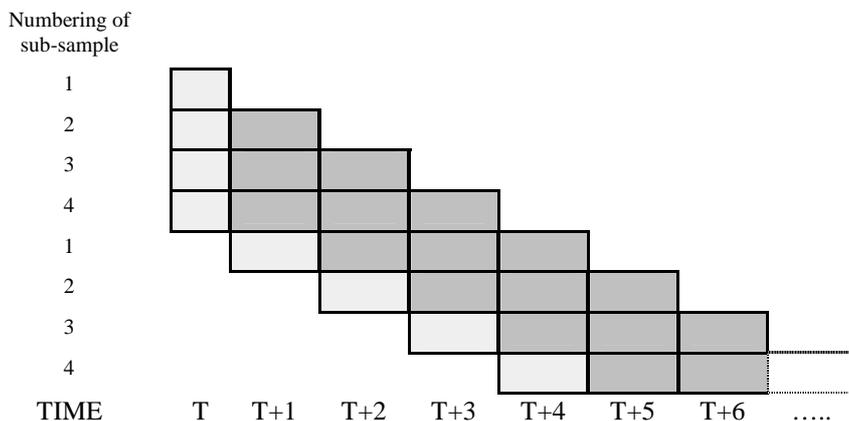
All countries adopted for their 2009 operation the four-year rotational design recommended by Eurostat, with the exception of Norway and France where a longer panel duration (eight and nine years, respectively) was used and Luxembourg where a pure panel is supplemented with a new sample each year. Finally, the Finnish SILC design is not purely integrative in the sense that cross-sectional survey contains two rotational groups and a part of the first group is selected for the longitudinal survey over four years

The following table (see table 1) summarizes the sampling design used in each country for the 2009 operation. Hungary is the only country to apply a different sampling design for drawing each rotation group. Annex 2 contains more details on the sampling design used in 2009 by each country.

### BOX 1- Illustration of the 4-year rotational design

The 4-year rotational design refers to a sample selection based on a number of 4 sub-samples or replications, each of them similar in size and design and representative of the whole population. From one year to the next, three out of four replications are retained, while the first selected one (the 'oldest' one) is dropped and replaced by a new replication.

#### PATTERN FROM YEAR 1



According to this design, the cross sectional component of the SILC operation in year  $t$  is composed of four sub-samples each of them drawn in different years:  $t-3$ ,  $t-2$ ,  $t-1$ ,  $t$ .

**Table 1:** Sampling design by country (2009)

Sampling unit	Sampling design	Country
<b>Dwellings/ Addresses</b>	Simple random sampling	MT
	Stratified simple random sampling	LU
	Stratified random sampling from former participants of micro census	DE
	Stratified multi-stage sampling	AT, CZ, ES, PL, PT, RO
	Stratified multi-stage systematic sampling	FR, LV, UK, NL
<b>Households</b>	Stratified random sampling	CY, SK, CH
	Stratified multi-stage sampling	IE
	Stratified multi-stage systematic sampling	BE, BG, EL, IT
	Stratified sampling according to different design by rotational group	HU
<b>Individuals</b>	Simple random sampling	DK, IS
	Systematic sampling	SE
	Stratified random sampling	LT
	Stratified and systematic sampling	EE, NO
	Stratified two-phase sampling	FI
	Stratified two-stage systematic sampling	SI

Source: National Intermediate Quality Reports 2009

The sampling unit can be the address, the dwelling, the household or the individual according to the design chosen by the country. In the case of a sample of dwellings or addresses, if more than one household share the same dwelling, dwellings must be regarded as clusters of households. All the households and all persons aged 16 and over living in each household are eligible for the survey. As showed by the table above, thirteen out of thirty countries selected a sample of dwellings or addresses. Additional nine countries selected a sample of household for the EU-SILC 2009 operation. Households are clusters of individuals and all the members aged 16 and over at the end of the income reference period of a selected household are eligible for inclusion in the sample. Countries that carry out a sampling of individuals, instead, only select persons of age 16 and over and the household is defined as the household of which the selected person is a member at the beginning of the survey. Nordic countries as well as Estonia, Lithuania and Slovenia are used to select a sample of individuals.

### *Sample size*

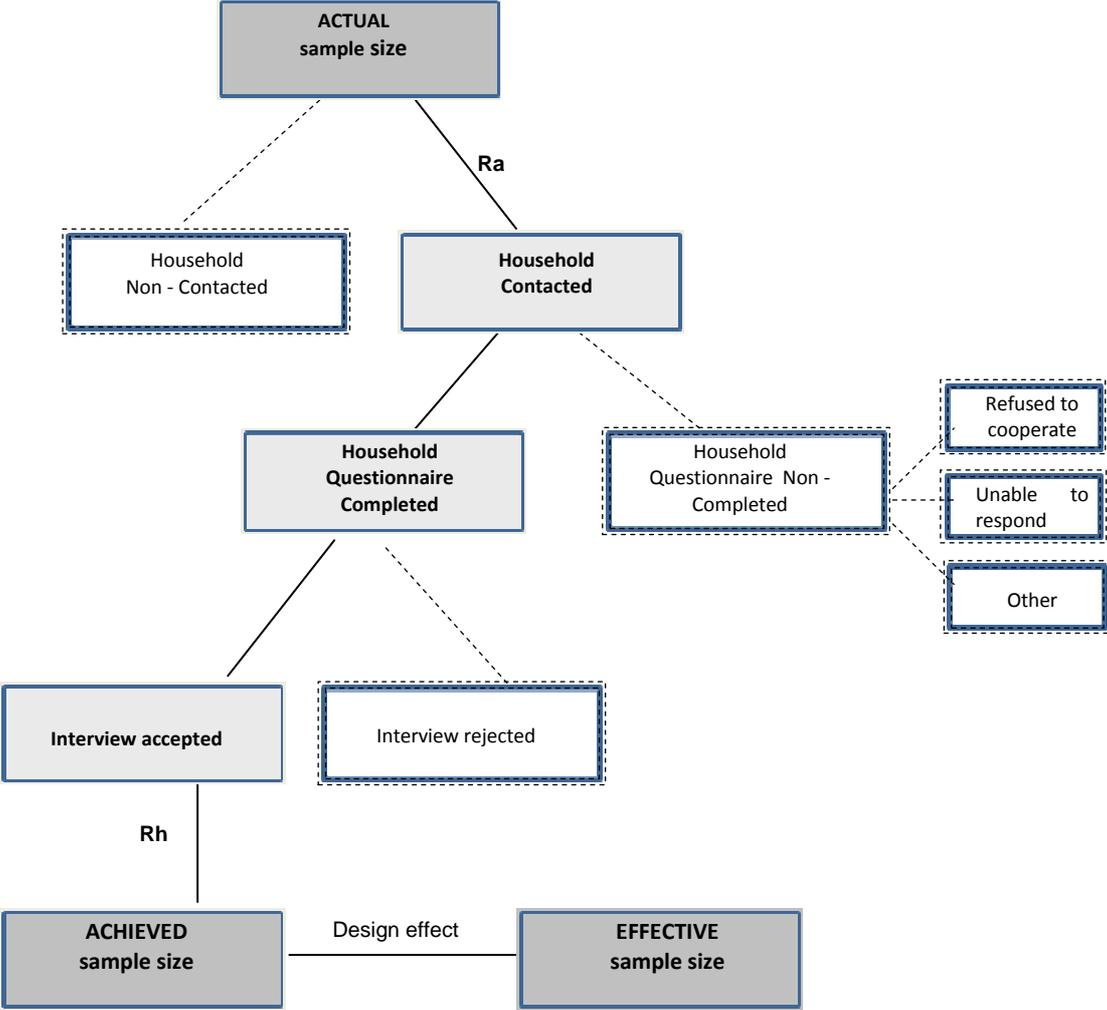
Concerning the sample size in the SILC instrument, three different definitions have to be kept in mind:

- the actual sample size is the number of sampling units selected in the sample;
- the achieved sample size is the number of observed sampling units (household or individual) with an accepted interview;
- and finally, the effective sample size is defined as the achieved sample size divided by the design effect.

The Framework Regulation and its updates define the minimum effective sample size, which is the size that would be required if the survey was based on a simple random sampling. The actual sample sizes have to be larger to the extent that the design effect exceeds 1.0 in order to compensate the loss of effectiveness namely by the use of complex sampling design. The design effect is basically the ratio of the actual variance, under the sampling method actually used, to the variance computed under the assumption of simple random sampling.

Figure 1 hereafter presents in a schematic way the different concepts used when defining the sample size and the relation between these concepts.

**Figure 1:** Different concepts used in the definition of the sample size



The following table shows, for each country, the actual sample size, the achieved sample size, and the minimum effective sample size requested by Regulation. The effective sample size is not included in the following table due to the lack of comparability of methodologies used by countries for computing the design effect. Eurostat is currently working to have harmonised methods and tools to compute the design effect.

**Table 2:** Actual, achieved and effective sample size in terms of households compared with the legal requirements, by country (2009)

Country	Minimum Effective Sample Size (Legal requirement)	Actual Sample Size	Achieved Sample Size
Sample of households			
BE	4 750	9 879	6 135
BG	4 500	7 282	5 608
CZ	4 750	12 299	9 911
DE	8 250	17 027	13 087
EE	3 500	6 815	4 965
IE	3 750	6 866	5 183
EL	4 750	8 466	7 036
ES	6 500	17 003	13 360
FR	7 250	13 214	10 603
IT	7 250	25 174	20 492
CY	3 250	3 709	3 145
LV	3 750	7 610	5 797
LT	4 000	6 265	5 132
LU	3 250	8 493	4 249
HU	4 750	12 156	9 912
MT	3 000	4 596	3 646
AT	4 500	8 383	5 878
PL	6 000	16 859	13 224
PT	4 500	6 176	4 961
RO	5 250	8 217	7 745
SK	4 250	5 988	5 264
UK	7 500	12 530	8 365
CH	4 250	10 284	7 372
Sample of persons			
DK	5 500	10 958	5 866
NL	6 500	11 834	9 728
SI	6 750	12 605	9 282
FI	5 000	12 984	10 137
SE	5 750	10 498	7 544
IS	3 000	4 144	2 903
NO	4 750	9 169	5 430

Source: Micro-database (March 2011) and Regulation N°1177/2003 (annex 2) and its update for minimum effective sample size.

### *Substitution*

Spain and Ireland are the only countries to use substitution. The national 2009 intermediate quality report of Spain can be consulted through the Eurostat website ([http://epp.eurostat.ec.europa.eu/portal/page/portal/income\\_social\\_inclusion\\_living\\_conditions/quality/national\\_quality\\_reports](http://epp.eurostat.ec.europa.eu/portal/page/portal/income_social_inclusion_living_conditions/quality/national_quality_reports)) for more details. The one of Ireland is unfortunately not available.

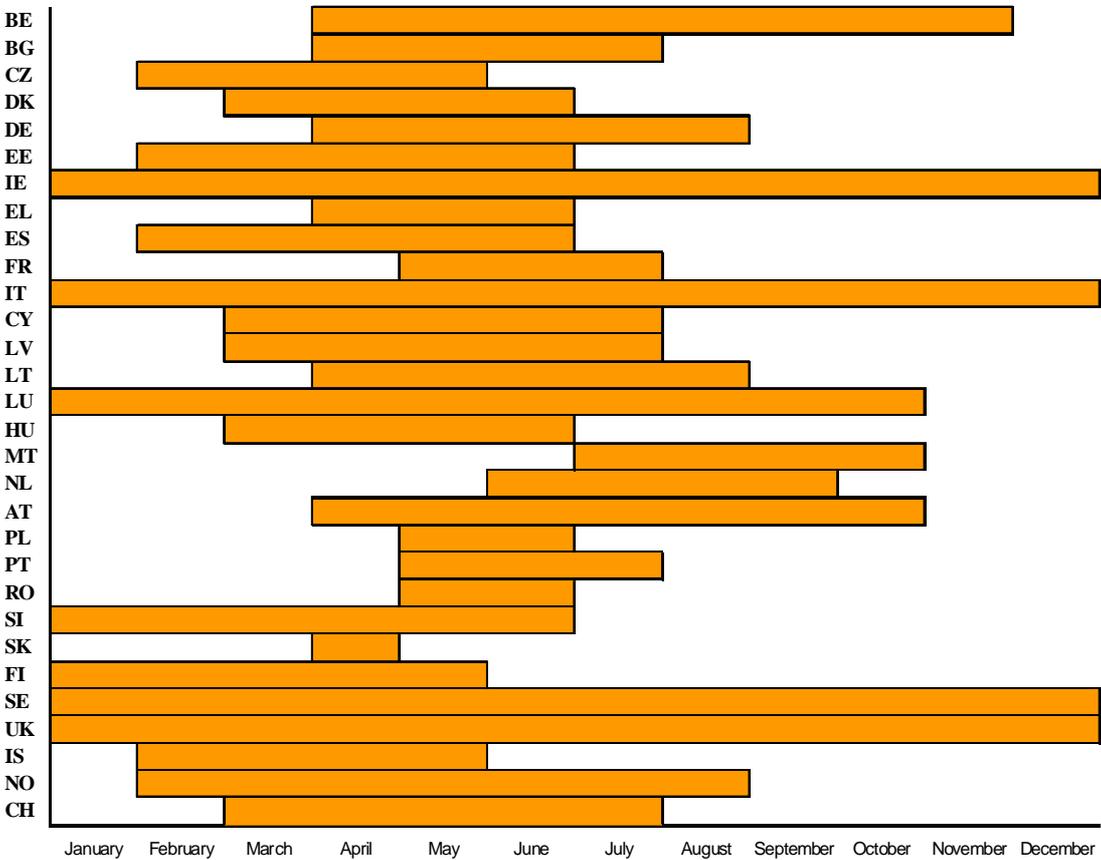
### *Sample distribution over time*

The following chart summarizes the fieldwork period by country, where the figures correspond to the information on the month of the household interview (HB050). The coloured cells correspond to the months when the interviews took place.

The fieldwork lasted between four and five months in fifteen countries. Concerning the rest of the countries, the fieldwork duration was shorter in six cases and longer in seven cases. In particular, Slovakia was the only country to carry out all the data collection in one month, and,

on the contrary, Ireland, Italy, Sweden and the United Kingdom performed a continuous survey (12 months).

**Figure 2:** Fieldwork period for the 2009 operation



Source: Micro-database (March 2011)

For their 2009 operation, most countries started data collection before April. Eighteen finished the fieldwork period by July. The twelve other countries which finished later are: Germany, Lithuania and Norway (all 3 in August), the Netherlands (in September), Luxembourg, Malta, Austria (all 3 in October), Belgium (in November), plus the four countries with a continuous survey, Ireland, Italy, Sweden and the United Kingdom.

**1.2. Sampling errors**

Sampling errors refers to the variability that occurs at random because of the use of a sample rather than a census. Therefore sampling errors affect any indicator based on EU-SILC data.

Measuring sampling errors is an important step in assessing the accuracy as confidence intervals in which the population value lies with a high probability can be easily derived. It is implicitly assumed in this development that there are no non-sampling errors. However, their effect can be significant and can distort the confidence intervals.

The following table presents the different methods used by each country to estimate the standard errors for 2009 cross sectional indicators.

**Table 3:** Method used for variance estimation by country (2009)

<b>Country</b>	<b>Short description of the method used</b>
<b>BE</b>	No information about the method used
<b>BG</b>	JRR method with SAS program developed by university of Siena
<b>CZ</b>	JRR method with SAS program developed by university of Siena
<b>DK</b>	SAS procedure 'Surveymeans' (CLAN used to calculate cross-sectional weights)
<b>DE</b>	No information about the method used
<b>EE</b>	JRR method with SAS program developed by university of Siena
<b>IE</b>	No quality report received
<b>EL</b>	JRR method
<b>ES</b>	Bootstrap replication method
<b>FR</b>	Linearization plus POULPE (software developed by INSEE)
<b>IT*</b>	Linearization or balanced repeated replication method according to the considered indicators
<b>CY</b>	Linearization method using SPSS program and the module Complex Samples.
<b>LV</b>	Taylor linearization method (using the software SUDAAN and SPSS )
<b>LT</b>	Taylor linearization method using the SAS program CLAN
<b>LU</b>	Bootstrap replication method
<b>HU</b>	Bootstrap replication method
<b>MT</b>	Linearization method using the SAS program
<b>NL</b>	Linearization method using the software package BASCULA
<b>AT **</b>	Bootstrap or linearization method according to the considered indicators
<b>PL</b>	Bootstrap replication method with SAS program
<b>PT</b>	Two steps: 1. Linearization method using the Eurostat SAS program 2. Variances obtained under the SAS macro CALJACK (incorporating Jackknife method)
<b>RO</b>	JRR method with SAS program developed by university of Siena
<b>SI</b>	Bootstrap replication method
<b>SK</b>	Linearization method with SAS, plus SAS procedure 'Surveymeans'
<b>FI</b>	Bootstrap replication method
<b>SE</b>	Using formula for simple random sampling $S=\text{SQR}(P*(1-P)/n)$
<b>UK</b>	No computation until now (will be addressed later this year)
<b>IS ***</b>	Linearization or bootstrap repeated replication method according to the considered indicators
<b>NO</b>	JRR method with SAS program developed by university of Siena
<b>CH</b>	Linearization method using the SAS program

Source: National Intermediate Quality Reports 2009 and bilateral email exchange between Eurostat and countries

\* In ISTAT, sampling errors and design effect were estimated by linearization approach for the 'at risk of poverty threshold', 'at risk of poverty rate', 'Gini index', 'gender pay gap' and by Balanced Repeated Replication technique for the 'relative median at risk of poverty gap' and the 'income quintile share ratio'.

\*\* Statistics Austria applied bootstrapping for some indicators (before social transfers including old-age and survivors' benefits: 65+ years and woman 65+ years; median share of housing cost by age and poverty status and median share of housing cost by age and sex) and for all other indicators the linearization method was used.

\*\*\* Statistic Iceland applied bootstrap repeated replicates for the S80/S20 and the aggregate replacement ratio, and the linearization method for the other indicators.

Among the countries for which the used method was explained, the majority used the linearization approach (11 countries). The Jackknife Repeated Replication (JRR) procedure was applied in 5 countries and the Bootstrap replication method in 6 countries. Four countries combined two different methods: Italy, Austria and Iceland use a replication method for some indicators and the linearization for the others, while Portugal applied a two-step approach combining the linearization and the Jackknife method.

As mentioned above, sampling design affects any indicator calculated from the EU-SILC data. The central indicator of EU-SILC is the at-risk-of-poverty rate (after social transfers), which is defined as the share of persons with an equivalised disposable income below 60% of the median income (at-risk-of-poverty threshold). This indicator is used as a reference for determining the minimum level of accuracy to be achieved. Nevertheless, some countries did not provide Eurostat with the value of the standard error for the at-risk-of-poverty rate for the total population but for its breakdown par gender. In this case, the results are presented in Table 4 for both the at-risk-of-poverty rate for the male and the female population. Two countries (UK and IS) did not give the standard errors for any indicator defined in the framework of the Open Method of Coordination but gave it for the income variables. In this last case, table 4 presents the results for the mean of the total household disposable income (variable HY020).

Table 4 below contains the estimated standard errors, calculated by the countries, as stated in the national Quality Reports<sup>3</sup>, given that a standard procedure is not available at Eurostat. The standard error was for some countries given in the National Quality Report in terms of 'absolute' standard error which corresponds to the sample standard deviation (square root of the sample variance) divided by the square root of the sample size and for other countries in terms of 'relative' standard error which corresponds to the absolute standard error divided by the mean and expressed as percentage. The given number has been transformed in terms of 'absolute' standard error when needed in order to present only one concept in table 4.

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<sup>3</sup> The values for the indicator could be different from the figures currently published on the Eurostat website.

**Table 4:** Estimated standard errors for the at-risk-of-poverty rate (2009)

Country	Population	Indicator value in National Quality Report (provisional/national)	Absolute standard error
<b>Indicator: At-risk of poverty rate (total population)</b>			
BE	total	:	:
DK	total	13.1	0.47
GE	total	15.5	0.11
EE	total	19.7	0.60
IE	total	:	:
EL	total	19.7	1.08
ES	total	19.5	0.44
FR	total	12.9	0.40
IT	total	18.0	0.33
CY	total	16.2	0.50
LV	total	25.7	0.75
LT	total	20.6	0.90
LU	total	14.9	0.87*
HU	total	12.0	0.49
MT	total	15.1	0.70
NL	total	11.1	0.30
AT	total	12.0	0.50
PL	total	17.1	0.45
PT	total	17.9	0.78
RO	total	23.0	0.95
SI	total	11.3	0.30
SK	total	11.0	0.46
FI	total	13.8	0.35
SE	total	13.4	0.25
CH	total	15.1	0.55
<b>Indicator: At-risk of poverty rate by gender</b>			
BG	male	19.9	1.37
	female	23.9	1.13
CZ	male	7.5	0.42
	female	9.5	0.37
NO	male	9.7	0.53
	female	12.7	0.78
<b>Indicator: Mean total disposable income (in national currency)</b>			
UK	total	27 407	300.7
IS	total	7 332 501	120 992

\* LU: the standard error for the at-risk of poverty rate for the 2009 operation is not yet available; as a proxy the one of 2008 is given.

Source: National Intermediate Quality Reports 2009

### **1.3. Non-sampling errors**

The term 'non-sampling error' is a generic one that encompasses any error other than sampling errors. In other terms non-sampling errors are errors that occur in all phases of the data collection and production process. The non-sampling errors discussed in this section are: sampling frame and coverage errors, measurement and processing errors and non-response errors.

#### *1.3.1. Sampling frame and coverage errors*

##### *Sampling frame*

The Framework Regulation calls for the selection of nationally representative probabilistic samples. Data are to be based on a nationally representative probability sample of the population residing in private households within the country, irrespective of language, nationality or legal residence status. All private households and all persons aged 16 and over within the household are eligible for the operation. Persons living in collective households and in institutions are generally excluded from the target population. The sampling frame as well as methods of sample selection should ensure that every individual and household in the target population is assigned a known probability of selection that is not zero.

The 31 countries which took part in the 2009 EU-SILC operation have used different sampling sources. Table 5 summarizes the information provided by each country in its 2009 Intermediate National Quality Report.

**Table 5: Source of the sampling frame (2009)**

Country	Source name	Short description	Update	Comments
BE	Central Population Register	This register includes all private households and their current members residing in the territory.	Twice a month	The Central Population Register of 1 February was used.
BG	2001 Population Census and National Civil registration System	The database includes all private households and their current member residing in the territory, independently of any socio-economic characteristics they may have.	Regularly	The frame is updated according to the administrative changes done only. Addresses and household data within the selected PSU are updated according to the ISD (Information System Demography data) which includes data from 1992 to 2001. Data source for the natural movement and the internal migration of the population is the National Civil Registration System.
CZ	Census Enumeration Districts (CEUs)	CEUs are small geographical areas covering the whole territory of the country. They are used as enumeration districts during the census.	Continuously	Continuously updated geographical register is maintained by the CZSO. For each CEU, a list of all buildings is maintained in the register from administrative data of the construction authorities. For each buildings, the number of dwelling units is recorded. It is continuously updated.
DK	Register of Population of Statistics Denmark	This register is based on Central Population Register (CRP) run by the Ministry of the Interior	Continuously	CRP is updated by the municipalities
DE	Subsample of the German microcensus (DSP)	The household of the access panel DSP are recruited from the German micro census (Mikrozensus).	Continuously	The DSP as a sampling frame is continuously enlarged and the socio-demographic information on all DSP participants is updated yearly.
EE	Population register of Estonia	This the document-based register of Estonian citizens and those having a living permission. The registered data originates from local governments, civilian registry offices, country councils, courts, Citizenship and Migration Board and other governmental organisations.	Regularly and in real-time	:
EL	Population Census	It includes all private households and their current members residing in the territory independently of any socio-economic characteristics they may have.	Every ten years	Two frames are used, which are the frame containing the PSUs (areas) and the frame of households within the selected PSUs. The former frame is updated every ten years through the general population census while the latter is updated before the selection of the sampling households used for data collection.
ES	Municipal Register	The Municipal Register is an administrative record of the residents in a municipality. All persons residing in Spain must appear in the Municipal register of the municipality where they usually live. A person living in more than one municipality must register only in the one where he/she lives longest in the year.	Continuously	The Municipal Register is formed, maintained, reviewed and kept by each municipality. It is continually updated. The new sample for SILC-2009 was obtained with the Register dated 20.02.2008
FR	Population Census and Survey of new dwellings (Base de sondage de logements neufs - BSLN)	BSLN is based on the list of building licences issued by the town hall and recorded in an administrative register (SITADEL) which includes around 300 000 dwellings each year.	Last update 2005 (BSLN) and 1999 (Census)	:

<b>IT</b>	Registers of the municipalities	:	Continuously	:
<b>CY</b>	2001 Census of Population with a supplementary list of newly constructed houses	All the households and their members living in the areas under the effective control of the Government of the Republic of Cyprus.	Last update 01/04/2008 (E.A.C)	The Statistical Service of Cyprus was provided by the Electricity Authority of Cyprus (E.A.C.) with a list of domestic electricity consumers, which contained all the new connections of electricity between 2001 and 2008. The E.A.C. distinguishes domestic consumers from other consumers (e.g. Industrial etc.)
<b>LV</b>	Population Census 2000 and Population register	:	Regularly	Two sampling frames were built for each sampling stage. At the first stage counting areas from the list of the Population Census 2000 were used as a sampling frame. All territory of Latvia was divided in small territories (smaller than NUTS4) during the Population Census 2000. The list contained information about the number of households in each counting area. At the second stage a sampling frame was built from the Population Register, Statistical register of dwellings and Statistical register of households. The second stage sampling frame was built by using a copy of the Population Register given in November 2008 thus the time lag between the last update of registers and the moment of the actual EU-SILC survey sampling was around 4 months.
<b>LT</b>	Residents register	:	Regularly	Not all movements of population within country are reflected, whereas not all population report about changing of address to the migration office. The households, living in selected person's address, were surveyed.
<b>LU</b>	Luxembourg Social Security database (IGSS) and Sample of international civil servants	:	:	:
<b>HU</b>	Updated dataset of addresses used in the population and housing census	:	Last update 2001	:
<b>MT</b>	Census of population & Housing 2005 database	The database includes all persons and household living in Malta and Gozo	Annually (Last update: 2005)	Regular updates concerning births, deaths and addresses are carried out by the NSO.
<b>NL</b>	Population register	:	Monthly	Each year in September the sampling frames for the next year are constructed. The sampling frame of addresses is updated monthly for changes related to births, deaths, migration, new addresses and vacancies. Also taken into account are changes in municipality boundaries and postal codes.
<b>AT</b>	Population register (ZMR)	The ZMR is continuously updated population register based on the registration of the addresses. It contains information on the person and on the address(es) of a person. It contains information on the person and on address of the person.	Continuously	The ZMR is administrated by the Federal Ministry of the Interior.
<b>PL</b>	The Domestic Territorial Division Register (TERYT system)	:	Annually (Last update: 1/01/2004)	It is updated annually with respect to the territorial division into statistical districts and census enumeration areas. The list of dwellings, names of towns, villages and streets are updated. Other changes due to new construction dismantle of buildings and administrative

				division modifications are also introduced. The sample for EU-SILC 2005 was selected in September 2004 from the sampling frame updated as for 1 January 2004.
<b>PT</b>	Master Sample	The Master sample is a stratified one-stage cluster sample used by the -Statistical Portugal as the sampling frame for household surveys. The MS was designed and selected using the information of the last Census of Population and Housing (Census/2001). It is constituted by almost 750000 private dwellings and it excludes collective households and institutions since they represent 1% of the total population residing in Portugal.	Non periodic	:
<b>RO</b>	Multifunctional Sample of Territorial Areas (EMZOT)	:	:	Due to the lack of information regarding the new buildings built after 2002, an update, on the basis of a micro-census survey, has been done for the PSU included in EMZOT in 2007.
<b>SI</b>	Central Register of Population (CRP) and enumeration areas	:	:	:
<b>SK</b>	2001 Population and Housing Census	:	:	Information about change in the fund of permanently occupied dwellings and houses from 2001 to 2004 and from 2004 to 2008 were used to updating of sampling frame for selecting of households for new rotation group.
<b>FI</b>	The Population Information System (PIS)	The PSI includes information on Finnish citizens and aliens permanently residents in Finland. It includes persons living in private households, institutions, persons living temporarily abroad and also homeless persons.	5th-8th day of every month	The register is continuously updated population register based on domicile. It is updated daily with information on population changes: births, deaths, migration, immigration and emigration, marriages, divorces, adoptions and changes of names by notifications of changes made by authorities.
<b>SE</b>	Total Population Register of Sweden (TRP)	:	Daily	TRP is updated on basis of the notifications on the vital statistics (births, deaths, changes in marital status, changes in citizenship, internal migration, immigration and emigration) sent by the Tax authorities.
<b>UK</b>	Postcode address file (PAF)	The PAF is a list of all addresses maintained by the UK Post Office. It is updated twice a year.	Twice a year	:
<b>IS</b>	The Population register of Iceland	:	Continuously	The sampling frame is the population register of Iceland in the end of the year 2008.
<b>NO</b>	Copy of the central population register (BEBAS)	:	Monthly	This register is monthly updated with information from local population register offices.
<b>CH</b>	Register of phone number (OFS)	:	3-month period	:

Source: National Intermediate Quality Reports 2009

### *Coverage errors*

Coverage errors are caused by the imperfections of a sampling frame for the target population of the survey. The target population is the set of elements for which estimates are desired while the frame population is composed of the units which are eligible for inclusion through a given sampling procedure. Ideally, there must be a one-to-one relation between target and frame population elements. If not, there are frame imperfections and we can encounter:

- over-coverage which relates either to wrongly classified units that are in fact out of the scope, or to units that do not exist in practice;
- under-coverage which refers to units not included in the sampling frame;
- misclassification which refers to incorrect classification of units that belong to the target population.

The following table summarizes the information about coverage problems and errors provided by each country in the national quality report with the exception of Germany, Italy, Portugal, Slovakia and United Kingdom who did not provided such a kind of information.

**Table 6: Coverage problems and errors by country (2009)**

Country	Main problems and coverage errors	Size of coverage errors
<b>BE</b>	<p>As there was a period of one month between the drawing of households and the survey itself, over-coverage, under-coverage and misclassification could be happen.</p> <p><u>Over-coverage</u>: Persons who died before the survey. Households who moved outside Belgium before the survey. Address is not the principal residence. <u>Under-coverage</u>: Immigrants who came to Belgium before the survey. Persons who moved from a household to create a new household. Diplomats exempt form an inscription in the national register. Refugees on a waiting list. <u>Misclassification</u>: household who moved from a region in Belgium to another region of Belgium.</p>	:
<b>BG</b>	<p>As there is a period of 2 months between the selection of households and the start of the survey, or the data in ISD is not updated yet (sometimes the delay is from 6 months to 1 year), over-coverage, under-coverage and misclassification may occur.</p>	<p>The percentage of the non-contacted addresses out of the total selected addresses by the reasons address does not exist or non-residential address or unoccupied is 0.2</p>
<b>CZ</b>	<p>No information is provided</p>	<p>Out of the 4300 newly sampled dwelling unit records 319 were found to be ineligible for the survey (7.4%)</p>
<b>DE</b>	<p>No information is provided</p>	:
<b>DK</b>	<p>Main <u>under-coverage</u> problems are: persons living in a private household but registered in the register as living in a collective household at the time of selecting the sub-sample; persons, who after the sub-sample were selected during its lifetime, moved to into a private Danish household from a collective household in Denmark or from abroad.</p>	:
<b>EE</b>	<p>Frame error is considered to be an <u>over-coverage</u> error if address-person did not actually belong to target population, i.e. was dead, had moved to another country, stayed in an institution permanently (had been there over half a year) or was surveyed through one of his/her household members. There is also some <u>under-coverage</u> of persons and households present in the population register due to absence of registration law in Estonia. In other words, people do not need to show their actual addresses in the Population Register.</p>	<p>All households classified under DB120=23 are considered to constitute over coverage error (1.5%).On average under-coverage of addresses in the population register may reach 5-6% and under-coverage of household may be at most 1-1.5%</p>
<b>EL</b>	<p>Coverage problems are more related to the frame of PSUs.</p>	:
<b>ES</b>	<p>No information is provided</p>	<p>The percentage of address does not exist or is non-residential or in unoccupied or not principal residence (DB0120=23) over the total original address (household) selected id 9.9</p>

Country	Main problems and coverage errors	Size of coverage errors
IT	No information is provided	:
FR	Some dwellings are not included in the Population Census due to the oldness of this sampling frame. BSLN (base de sondage de logements neufs) survey (updated to 2005) improves this situation adding new dwellings.No coverage problems are related to BSLN.	:
CY	Coverage problems encountered were: 1. the frame of the 2001 Census of Population was somehow outdated and as a result some housing unit were found to be empty or to be used for other purposes other than housing; 2. Some households included in the E.A.C. list were used as secondary residence, so they were out of scope of the survey; 3. Some households listed by the E.A.C. were impossible to be located due to incomplete information regarding their addresses; 4. Housing units built after April 2008, were not included in our sampling frame.	:
LV	The over-coverage relates either to misclassified units that are in fact out of scope, or to units that do not exist in practice.	In total the over-coverage rate of the total amount of dwellings included in the EU-SILC survey was 3.6% (277 from 7610 dwellings). The level of under-coverage is not estimated.
LT	No information is provided	The percentage of non-contacted address by the reason: address does not exist or is non-residential or in unoccupied or not principal residence (DB0120=23) out of total selected address is 5.9
LU	IGSS do not distinguish between private household and collective household. People do not join Luxembourgish social security system and people working for the international Institutions are not included in the Census sample frame. Migration trends are stronger in Luxembourg than any other country.	The percentage of non-contacted address by the reason: address does not exist or is non-residential or in unoccupied or not principal residence (DB0120=23) out of total selected address is 6.6%
HU	The under-coverage is due to the new buildings completed after the last updating	The under-coverage in percentage amounts to about 0.7%
MT	No information is provided	27 households, corresponding to 0.6 per cent of the total sample selected, were found to be ineligible addresses.
NL	As the fieldwork period starts six weeks later, coverage errors may occur: during the six weeks between drawing and application of the sample new addresses will be established and some addresses have become vacant or have been demolished. Institutional addresses are removed after drawing the sample by comparing the sample addresses with entries in the register of institutional addresses. This register is updated once a year, so a small number of over-coverage errors are to be expected.	:

<b>AT</b>	The sample nevertheless contained obsolete units, mainly due to changes that occurred between the reference date and the fieldwork. These changes are for example persons who emigrated or died since the reference date or persons who did not report changes of their main residence in time. Other units, for example accommodations newly built since the reference date were not included in the sampling frame. One problem connected with the sampling frame is the construction of the connection of persons living in one dwelling unit because there is no key of link to identify all persons that are living in dwelling. The connection of dwelling units has to be constructed by individual address characteristics but the connections constructed in this way are not always corrected.	:
<b>PL</b>	No information is provided	In the new sub sample selected for 2009 survey 7.5% of dwellings were found to be non-existing as well as uninhabited or temporary inhabited. 1% of selected dwellings had incorrect addresses.
<b>PT</b>	No information is provided:	6.4% of the addresses selected for the initial sample turn out to be inexistent, non residential addresses, non occupied or not a principal residence.
<b>RO</b>	Under-coverage rate was estimated as the ratio between number of new dwellings, built in the period end of 2002 year (the year of the census) - end of 2008 year and number of dwelling at the end of 2008. Over-coverage rate was estimated on the basis of the survey sample, as ratio between number of not-eligible dwellings and number of sampled dwellings.	Under-coverage rate was 3.29% Over-coverage rate was 1.96%.
<b>SI</b>	Persons living in collective households and diseased and emigrated persons were considered as out-of-scope units.	Under coverage rate is approximately 2%.
<b>SK</b>	No information is provided:	:
<b>FI</b>	There is no under-coverage in any population groups in PIS (The Population Information System). The criterion is statutory which means that a very small number of persons, e.g. those ones waited for a residence permit and stayed for longer time have not been covered de facto. The small over-coverage is a consequence of the necessity to draw sample in good time before the actual date of defining the sample households (31 Dec) and may also be related to registers updates - delays in the notifications of emigration, moving to reside permanently in institutions or deaths.	:
<b>SE</b>	Over-coverage consists of people who have died and people who have left the country but are still registered in Sweden. The sample is drawn several months before the fieldwork start but a check is made close to the start. Over-coverage in terms of people who have left Sweden permanently but are still registered in TRP is more difficult to discover. If we regard TRP as our population under-coverage by definition does not exist. There are of course people who reside in Sweden illegally or while waiting for residence permit.	The estimate size of this over-coverage has given the figure of approximately 35000 persons. Applied to EU-SILC this means 30 individuals of which many are discovered by the interviewers.
<b>UK</b>	There are no coverage errors associated with EU-SILC UK.	:

<b>IS</b>	Under-coverage of foreign citizens who live in Iceland is possible but it can be hard to assess. The fact that Iceland is an island makes it hard for foreigners to enter and stay in the country without being registered.	:
<b>NO</b>	There should be no coverage errors connected to this frame, except for the extremely few cases of emigrations which are wrongly coded as non-response instead of non-eligible because their emigration were not registered in the address. Over-coverage due to deaths and emigration between the updating of the sampling frame and the interview is almost always discovered during the fieldwork. Under-coverage due to immigration is relatively small, and partly because the new sampling frame is updated very frequently.	:
<b>CH</b>	Under-coverage: Household who do not have a telephone number cannot be contacted because they are not included in the register; households registered with several phone numbers. Over-coverage: enterprises, second residence for which there could be mistake in the register.	:

Source: National Intermediate Quality Reports 2009

### *1.3.2. Measurement and processing errors*

Generally, measurement errors arise from the questionnaire, the interviewer, the interviewee and the data collection method used.

Measurement and processing errors on which information is given by countries in their 2009 intermediate national quality report are quite diverse and varied. Nevertheless, the most frequently reported errors are the following:

- About the measurement errors:
  - The questionnaire testing
  - The training of interviewers
  - The quality control with re-interviews and record check studies
  
- About the processing errors
  - The description of data entry and coding
  - The description of editing controls

### *1.3.3. Non-response errors*

All surveys have to deal with non-response, i.e. information missing for some of the sample units. This section presents a summary and a comparison 2008-2009 of the available information.

#### *1.3.3.1. Achieved sample size*

The following table shows the achieved sample size for the 2009 cross-sectional component and compared it with the achieved sample size in the 2008 cross-sectional operation.

**Table 7: Achieved sample size (2009)**

Country	Total sample				New rotational group	
	No. of Households (2008)	No. of Households (2009)	ratio 2009/2008	No. of Persons 16+ (2009)	No. of households	% of total sample
BE	6 300	6 135	0.97	11 767	1 823	29.7
BG	4 344	5 608	1.29	13 150	2 015	35.9
CZ	11 294	9 911	0.88	19 765	2 575	26.0
DK	5 778	5 866	1.02	11 813	1 595	27.2
DE	13 312	13 087	0.98	23 832	3 920	30.0
EE	4 744	4 965	1.05	11 308	1 205	24.3
IE	5 247	5 183	0.99	9 902	1 308	25.2
EL	6 504	7 036	1.08	15 045	2 294	32.6
ES	13 014	13 360	1.03	30 836	3 927	29.4
FR	10 418	10 603	1.02	20 232	1 852	17.5
IT	20 928	20 492	0.98	43 111	5 882	28.7
CY	3 355	3 145	0.94	7 557	800	25.4
LV	5 196	5 797	1.12	12 207	1 916	33.1
LT	4 823	5 132	1.06	11 214	1 321	25.7
LU	3 779	4 249	1.12	8 625	:	:
HU	8 818	9 912	1.12	20 973	3 331	33.6
MT	3 368	3 646	1.08	8 485	1 226	33.6
NL	10 337	9 728	0.94	18 254	3 079	31.7
AT	5 711	5 878	1.03	11 062	2 016	34.3
PL	13 984	13 224	0.95	31 674	3 472	26.3
PT	4 454	4 961	1.11	11 101	1 638	33.0
RO	7 805	7 745	0.99	16 282	1 974	25.5
SI	9 028	9 282	1.03	25 386	3 242	34.9
SK	5 450	5 264	0.97	13 821	1 385	26.3
FI	10 472	10 137	0.97	20 106	5 280	52.1
SE	7 452	7 544	1.01	14 866	1 836	24.3
UK	8 936	8 365	0.94	15 646	2 906	34.7
IS	2 887	2 903	1.01	6 521	768	26.5
NO	5 553	5 430	0.98	10 620	771	14.2
CH	6 778	7 372	1.09	14 340	2 223	30.1

Source: Micro-database household H and personal P files (March 2011)

Main findings in these tables are the following:

- In the 2009 operation the achieved sample size in terms of number of households varies from below 4000 households in Iceland (2903), Cyprus (3145) and Malta (3646), to 10000-13500 in Finland (10137), France (10603), Germany (13087), Poland (13324) and Spain (13360), until nearly 20500 in Italy (20492). In terms of personal interviews, the range goes from below 7000 in Iceland (6521) to nearly 45000 in Italy (43111).
- The percentage of newly interviewed households is between 20% and 30% in sixteen countries and above 30% in the Netherlands (32%), Latvia, Hungary, Malta and Portugal (around 33%), Austria, Slovakia, Iceland (34%) and Bulgaria (36%). Norway and France present a percentage below 20% but it should be reminded that these

countries have a longer panel duration (8 and 9 years, respectively). In the other extreme, Finland has a percentage above 50% but it is because in this country half of the sample is renewed for the cross-sectional sample.

- A significant increase between 2008 and 2009 was observed in the achieved sample size in Bulgaria (+29%), in Latvia, Luxembourg, Hungary (+12%) and Portugal (+11%).

### *1.3.3.2. Unit non-response*

The Commission Regulation 28/2004 defined indicators aimed at measuring unit non-response in EU-SILC. They are respectively:

- Address contact rate (Ra): the ratio of the number of addresses successfully contacted, to the number of valid addresses selected.
- Household response rate (Rh): the ratio of the number of household interviews completed (and accepted in the data base), to the number of eligible households at the contacted addresses.
- Individual response rate (Rp): the ratio of the number of personal interviews completed (and accepted in the data base), to the number of eligible individuals in completed households.

Non-response is cumulative at the three stages (address contact, household interview and personal interview), so that the overall non-response rates for households and individual interviews are defined, respectively, as follows:

- Overall household interview non-response rate:  $NRh = 1 - (Ra * Rh)$
- Overall personal interview non-response rate:  $*NRp = 1 - (Ra * Rh * Rp)$

The following table presents the different response rates for the whole sample (W) and for the new entries (N) by country for the 2009 cross-sectional operation.

**Table 8:** Response rates: whole sample and new sample (2009)

	Address contact rate (Ra)		Household response rate (Rh)		Individual response rate (Rp)		Household non-response rate (NRh)		Overall individual non-response rate (*NRp)	
	Total sample	New sub-sample	Total sample	New sub-sample	Total sample	New sub-sample	Total sample	New sub-sample	Total Sample	New sub-sample
<b>BE</b>	99.3	98.9	63.8	43.5	99.0	98.9	36.7	56.9	37.3	57.4
<b>BG</b>	96.9	95.0	80.0	72.9	99.6	99.6	22.5	30.7	22.8	31.0
<b>CZ</b>	97.4	92.6	84.5	64.2	100.0	100.0	17.7	40.5	17.7	40.5
<b>DK</b>	78.6	85.4	68.1	65.5	100.0	100.0	46.5	44.1	46.5	44.1
<b>DE</b>	84.4	67.8	91.1	89.1	99.5	99.5	23.1	39.6	23.5	40.0
<b>EE</b>	89.2	79.3	83.6	68.2	99.2	98.9	25.4	45.9	26.0	46.5
<b>IE</b>	100.0	100.0	78.9	80.5	100.0	100.0	21.1	19.5	21.1	19.5
<b>EL</b>	99.8	99.4	85.0	77.3	99.1	98.6	15.2	23.2	16.0	24.2
<b>ES</b>	98.7	98.7	83.2	70.4	98.7	98.7	17.9	30.5	19.0	31.4
<b>FR</b>	99.5	98.3	83.5	73.2	99.5	99.5	16.9	28.0	17.3	28.4
<b>IT</b>	99.3	98.7	84.2	78.2	100.0	100.0	16.3	22.8	16.3	22.8
<b>CY</b>	99.7	99.1	89.8	84.4	99.9	100.0	10.5	16.4	10.5	16.4
<b>LV</b>	98.2	96.5	80.7	67.6	98.8	97.8	20.8	34.8	21.7	36.2
<b>LT</b>	99.5	98.2	87.5	73.9	99.8	99.7	13.0	27.4	13.1	27.6
<b>LU</b>	96.6	:	53.7	:	100.0	:	48.1	:	48.1	:
<b>HU</b>	99.9	99.9	84.7	89.7	99.9	99.9	15.4	10.4	15.5	10.5
<b>MT</b>	96.7	94.8	82.5	74.8	100.0	100.0	20.2	29.1	20.2	29.1
<b>NL</b>	94.3	94.2	88.4	82.3	100.0	100.0	16.6	22.5	16.6	22.5
<b>AT</b>	99.0	99.5	72.6	59.2	98.9	99.7	28.1	41.1	28.9	41.3
<b>PL</b>	99.6	98.7	83.0	65.9	92.3	91.7	17.4	34.9	23.7	40.3
<b>PT</b>	98.8	98.3	87.9	80.2	99.4	99.4	13.1	21.2	13.6	21.6
<b>RO</b>	99.8	99.4	96.6	90.4	99.7	99.6	3.5	10.1	3.8	10.6
<b>SI</b>	98.8	97.7	78.6	71.3	100.0	100.0	22.3	30.3	22.3	30.3
<b>SK</b>	94.6	93.7	93.6	98.5	100.0	100.0	11.5	7.7	11.5	7.7
<b>FI</b>	100.0	100.0	79.2	71.7	100.0	100.0	20.8	28.3	20.8	28.3
<b>SE</b>	91.4	90.1	79.9	78.5	100.0	100.0	27.0	29.2	27.0	29.2
<b>UK</b>	96.3	97.0	74.1	61.6	100.0	100.0	28.7	40.3	28.7	40.3
<b>IS</b>	100.0	100.0	73.1	73.4	100.0	100.0	26.9	26.6	26.9	26.6
<b>NO</b>	99.3	99.2	60.9	59.9	100.0	100.0	39.6	40.6	39.6	40.6
<b>CH</b>	97.7	97.1	76.9	71.3	99.2	99.0	24.8	30.8	25.4	31.4

Source: Micro-database (March 2011)

The main conclusions derived from this table are the following:

- The address contact rates (Ra) for the whole sample are rather high. In 18 countries it is higher than 98%. The lowest values are observed in Denmark (78.6%) and Germany (84.4%). For the new sample the values are always below the ones for the whole sample with only five exceptions: Denmark (W: 78.6; N: 85.4), Austria (W: 99; N: 99.5) and the United Kingdom (W: 96.3; N: 97).
- The household response rates (Rh) for the whole sample differ considerably among countries: from Luxembourg (53.7%) to Germany, Slovakia and Romania (all three above 90%). Again (as for Ra) the values for the new sample are always below the

ones for the whole sample with only four exceptions: Ireland (W: 78.9; N: 80.5), Hungary (W: 84.7; N: 89.7), Slovakia (W: 93.6; N: 98.5) and Iceland (W: 73.1; N: 73.4).

- The individual response rate (Rp) for the whole sample as well as for the new sample is above 98% for all countries with only one exception: Poland (respectively 92.3% and 91.7%).
- The overall household interview non-response rate (NRh) for the whole sample is below 10% only in Romania (3.5%). A quite acceptable rate between 10 and 20% is recorded in twelve additional countries (CZ, EL, ES, FR, IT, CY, LT, HU, NL, PL, PT, SK). On the other extreme, the household non-response rate is quite high in Denmark (46.5%) and in Luxembourg (48.1%). The rates for the new sample are always bigger than for the whole sample with only four exceptions: Denmark (W: 46.5; N: 44.1), Ireland (W:21.1; N: 19.5), Hungary (W:15.4; N: 10.4) and Slovakia (W: 11.5; N: 7.7).
- The overall personal interview non-response rate (\*NRp) presents a similar picture as the one of the overall household interview non-response rate.

Let us remind that rates for the new entries are missing for Luxembourg because of the use of a pure panel.

At this stage, the use of models integrating external control variables is desirable in order to correct for non-response. Most of the countries apply either a standard post-stratification based on homogeneous response groups or a more sophisticated logistic regression model.

The partial unit non-response is defined as the failure to obtain a personal interview with a subset of the eligible adults in a household. Different methods have been used to treat partial unit non-response in the 2009 EU-SILC operation. Nevertheless, majority of countries apply full-case imputation: Belgium, the Czech Republic, Estonia, France, Cyprus, Italy, Lithuania, Austria, Poland and the United Kingdom. Another set of countries applied in 2009 an adjustment factor to the total income based on characteristics of the household and of the non-interviewed persons (variable HY025): Bulgaria, Germany, Greece, Latvia, Portugal, Romania and Slovakia. Finally, Ireland, Malta, Luxembourg, the Netherlands and Hungary deleted all households with one or more missing persons and proceeded to weight adjustment.

#### *1.3.3.3.Item non-response*

Item non-response is present for some income components and it has been dealt with imputation. This technique aims to 'fill the holes' in a distribution, so only unit non-response can be assumed. However, it has to be kept in mind that imputed values are not exact values and often underlain on a model that could not be the perfect fit of the reality. Imputation can have a significant effect on the overall accuracy: it generally skews a sample distribution so estimates will be biased. Furthermore, variance estimates assuming that imputed values are exact ones will generally be biased.

### **1.4. Mode of data collection**

Information is extracted either from registers or collected from interviews.

As for the interviews, there are four different ways to collect the data: Paper-Assisted Personal Interview (PAPI), Computer-Assisted Personal Interview (CAPI), Computer-Assisted Telephone Interview (CATI), Self-administrated questionnaire. Table 9 hereafter presents the different modes of data collection used by the countries for the 2009 cross-sectional operation<sup>4</sup>.

**Table 9:** Percentage of individual records obtained by each mode of data collection by country (2009)

	<b>PAPI</b>	<b>CAPI</b>	<b>CATI</b>	<b>Self-administered</b>
<b>BE</b>	:	100	:	:
<b>BG</b>	100	:	:	:
<b>CZ</b>	79.1	20.9	:	:
<b>DK</b>	:	:	93.0	7.0
<b>DE</b>	:	:	:	100
<b>EE</b>	2.0	97.8	0.2	:
<b>IE</b>	:	100	:	:
<b>EL</b>	86.5	9.9	3.6	0.1
<b>ES</b>	:	92.6	7.4	:
<b>FR</b>	:	100	:	:
<b>IT</b>	100	:	:	:
<b>CY</b>	0.1	99.9	:	:
<b>LV</b>	6.7	57.1	36.2	0.1
<b>LT</b>	68.8	:	30.8	0.4
<b>LU</b>	100	:	:	:
<b>HU</b>	100	:	:	:
<b>MT</b>	:	100	:	:
<b>NL</b>	:	:	100	:
<b>AT</b>	:	58.0	42.0	:
<b>PL</b>	100	:	:	:
<b>PT</b>	3.9	96.1	:	:
<b>RO</b>	100	:	:	:
<b>SI*</b>	:	47.2	52.8	:
<b>SK</b>	99.7	:	:	0.3
<b>FI</b>	:	3.5	96.5	:
<b>SE</b>	0.2	:	99.8	:
<b>UK</b>	:	100	:	:
<b>IS</b>	:	:	100	:
<b>NO</b>	:	1.4	98.6	:
<b>CH</b>	:	0.3	99.7	:

Source: Micro-database (March 2011)

\* In Slovenia the mode of interviewing depends first of all on the wave of the interviewing and on the availability of a phone for the household.

The main conclusions from this table are the following:

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<sup>4</sup> Figures are obtained adding up the number of interviews carried out by each mode of data collection by each country and dividing it by the total of the interviews carried out in each country. Only face-to-face interviews are taken into account.

- PAPI is the mode of data collection mostly used in ten countries, CAPI in eleven, CATI in eight and Self-administered only in Germany.
- Among the eleven countries using CAPI as the main mode of data collection, nine of them present a percentage above 80%.
- Even if CATI is mainly used in eight countries, six additional countries also use it. CATI is generally used as a complement of CAPI has been used, and of PAPI in Lithuania and Greece.

Proxy interviewing is permitted if the proxy rate is kept as limited as possible. Some countries that encountered rather high non-response rates chose to use proxies to ensure a certain degree of accuracy in their data. For instance, in countries that use the selected respondent type of survey, the household respondent (in most cases selected respondent) is asked for information about all household members, therefore, these countries have a high percentage of proxy interviews concerning personal interviews.

It should be kept in mind that the respondent error tends to increase by proxy responses. This kind of interviewing can result in biased responses, because the proxy generally takes place in the case of selective categories of persons, for example people in employment or self-employment which are less accessible than retired or unemployed persons. That problem can become much more serious in a complex survey like EU-SILC, with complex content. For instance, EU-SILC collects non-monetary income components (e.g., income from private use of company car...) which are difficult to report by proxy. The same applies of course to subjective and personal questions.

The table below presents the extent of proxies (number and percentage of interviews) obtained in the 2009 cross-sectional operation.

**Table 10:** Number and percentage of proxy interviews by country (2009)

Country	No. of Proxy	Total	%
BE	1501	11652	12.9
BG	2559	13149	19.5
CZ	2936	19765	14.9
DK	5789	11813	49.0
DE	4711	23832	19.8
EE	2496	11220	22.2
IE	2721	9902	27.5
EL	1147	15045	7.6
ES	12135	30420	39.9
FR	5544	20125	27.5
IT	8097	43111	18.8
CY	1587	7553	21.0
LV	2592	12064	21.5
LT	1583	11193	14.1
LU	1600	8625	18.6
HU	2330	20957	11.1
MT	2647	8485	31.2
NL	278	18254	1.5
AT	2473	10944	22.6
PL	5393	29229	18.5
PT	2044	11101	18.4

<b>RO</b>	2217	16282	13.6
<b>SI</b>	2248	9282	24.2
<b>SK</b>	642	13821	4.6
<b>FI</b>	8577	20106	42.7
<b>SE</b>	408	14866	2.7
<b>UK</b>	1594	15376	10.4
<b>IS</b>	0	6491	0
<b>NO</b>	2619	10450	25.1
<b>CH</b>	437	12998	3.4

Source: Micro-database (March 2011)

This table outlines that only five countries present a proxy rate below 10% (Greece, the Netherlands, Slovakia, Sweden and Switzerland). At the other extreme two Member States present a proxy rate above 40% (Denmark and Finland), but which are countries using the 'selected respondent model'. Let us point out the important comment received from Finland on this issue: "Most of the proxy respondents are parents or spouses. Proxies are mostly (89 %) 1st or 2nd persons responsible for the accommodation, which also indicates their competence regarding knowledge of the household affairs". Other nine countries have a proxy rate between 20% and 40% (Estonia, Ireland, Spain, France, Latvia, Malta, Austria, Slovenia and Norway).

### **1.5. Interview duration**

The EU-SILC Framework Regulation states that the total duration of the interview shall not exceed one hour on average. The following table presents for the 2009 cross-sectional operation the mean interview duration in minutes calculated as the sum of the durations of all interviews at household (HB100) or personal level (PB120), divided by the number of household members aged 16 and over whose household questionnaire is completed and accepted for the database (PB030)<sup>5</sup>.

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<sup>5</sup> If the household interview duration (HB100) or one personal interview duration (PB120) is missing for one member of the household, then the household is excluded from the calculation.

**Table 11: Average interview duration in minutes by country (2009)<sup>6</sup>**

Country	2006	2007	2008	2009
BE	26.9	22.5	22.3	23.9
BG	37.6	32.6	35.9	35.7
CZ	42.5	41.3	36.6	30.3
DE	45.8	46.6	46.7	48.6
EE	22.2	20.9	22	21.6
IE	21	22.1	22.1	22.1
EL	26.5	26.9	24.9	24.5
ES	19.3	14.6	14.1	14.9
FR	27.9	27.4	24.1	26.3
IT	32.6	33.8	34.7	34.4
CY	18.3	23.3	20.5	21.5
LV	18.5	35.7	12.5	10.6
LT	28.5	28.4	36.2	32.8
LU	25.4	29.9	29.7	38.1
HU	32.4	32.2	33.5	29.2
MT	15.1	15.5	19.3	21
NL	9.8	11.1	13.3	12
AT	23.9	17.9	25.1	23.9
PL	39.5	38	36.3	35.5
PT	29.4	27.9	28.5	27.9
RO	NA	32.8	33.5	29.9
SL	27.7	38.4	25.4	26.1
SK	32.3	28.9	27.8	27.3
SE	27.5	27.2	32.6	35.9
UK*	59.6	54.5	59.1	57.9
IS	:	21.2	26.8	26.7
NO	10.1	12.5	11.7	13.1
CH	:	19.3	26.7	27.6

\*The EU-SILC questions are included as part of the General Lifestyle Survey questionnaires. The interview duration in the table represents the total interview time for the GLF and EU-SILC questions, not the component required for EU-SILC.

Source: Micro-database (March 2011)

The main conclusions from the table are the following:

- For all countries the average in 2009 is below 60 minutes.
- There is no clear picture on the evolution of the average interview duration. For some countries the evolution can be described as decreasing year after year, but for most of

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<sup>6</sup> There is no information from Denmark and Finland because PB120 is missing for these countries.

them the evolution is not regular and the lowest average is not always found for the last year.

- In 2009, the lowest average is found in Latvia (10.6 min.), the Netherlands (12 min.), Norway (13.1 min.) and Spain (14.9 min.) while the highest value is in the United Kingdom<sup>7</sup> (57.9 min.) followed by Germany (48.6 min.), Luxembourg (38.1 min.), Bulgaria, Sweden and Poland (all about 36 minutes).

## **2. COMPARABILITY**

Comparability is a critical aspect of EU-SILC and non-comparability may come from national choices within the general framework. According to the Regulation No 1177/2003, countries are asked to provide information on the differences between the national concepts and standard EU-SILC basic concepts and definitions and on components of income.

The present section only reflects the information supplied by countries in their national quality reports. When no information is available on a given concept for a given country, Eurostat has assumed that the country follows the standard definition, i.e. it is fully comparable, which could hide some further inconsistencies.

### **2.1. Basic concepts and definitions**

The basic concepts and definitions taken into account by the countries for assessing the comparability are: the reference population, the private household definition, the household membership, the income reference period(s) used, the reference period for taxes on income and social insurance contributions, the reference period for taxes on wealth, the lag between the income reference period and current variables, the total duration of the data collection of the sample and basic information on activity status during the income reference period. Detailed information concerning each country can be found in its national quality report.

Concerning the reference population, the private household definition and the household membership, the following table shows an overview by country.

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<sup>7</sup> In the case of the United Kingdom, EU-SILC questions are included as part of the General Household Survey questionnaire and there is no information on the interview duration of EU-SILC alone

**Table 12:** Comparability of the basic definitions by country (2009)

	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR
<b>Reference population</b>	F	F	F	F	F	L	:	F	F	F
<b>Private household definition</b>	F	F	F	F	F	F	:	F	F	F
<b>Household membership</b>	F	F	F	F	F	F	:	F	L	F

	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL
<b>Reference population</b>	F	F	F	F	F	F	F	F	F	F
<b>Private household definition</b>	L	F	F	F	F	F	F	F	F	F
<b>Household membership</b>	L	F	F	F	F	F	F	F	F	F

	PT	RO	SI	SK	FI	SE	UK	IS	NO	CH
<b>Reference population</b>	F	L	F	F	F	F	F	F	F	F
<b>Private household definition</b>	F	F	F	F	F	F	L	F	F	F
<b>Household membership</b>	L	F	F	F	F	L	L	F	F	F

F: fully comparable; L: largely comparable

Source: National Intermediate Quality Reports 2009

Most countries follow the standard definitions with only some exceptions:

- **Reference population:** Romania and Estonia

Romania: Households with diplomatic staff members are excluded from the target population.

Estonia: Persons living in collective households are included in the reference population.

- **Private household definition:** Italy and the United Kingdom

Italy uses the following definition: Cohabitants related through marriage, kinship, affinity, patronage and affection constitute the private household.

United Kingdom: A household is defined as a single person or a group of people who have the address as their only or main residence and who either share one meal a day or share the living accommodation.

- **Household membership:** Czech Republic, Spain, Italy, Portugal, Sweden and the United Kingdom

The Czech Republic: Subtenants, guest and servants are not considered as household members unless they share all their expenses with the household.

Spain: the following persons, provided they share the expenses of the household and intend to stay at least 6 months, are not considered as household members in the Spanish SILC (but should be under the EU standard definition) so long as they have another address which they regard as their usual residence: resident boarders, lodgers, tenants, visitors or domestic servants (live-in domestic employees, au-pair).

Italy: Live-in domestic personal (au pairs) are not included as household members. Concerning these persons, only some socio-demographic information is collected (date of birth, sex, marital status, and duration of stay in the household). The number of these persons included in the sample was 51 (0.08% of interviewed individuals).

Portugal: Contrary to the EU-SILC concept, persons absent for long periods, but having household ties (persons working away from home) are not considered as household members if the absence is for more than 6 months (the income obtained from them is considered as a private transfer).

Sweden: Short-term migrations, defined as people who stay in Sweden 3-12 months, are not covered.

United Kingdom: A person is in general regarded as living at an address if he or she (or the informant) considers the address to be his or her main residence. There are however, certain rules which take precedent over this criterion. Children aged 16 or over who live away from home for the purposes of either work or study and come home only for holidays are not included at the parental address under any circumstances. Children of any age away from the home in a temporary job and children under 16 at boarding school are always included in the parental household. Anyone who has been away from the address continuously for 6 months or longer is excluded. Anyone who has been living continuously at the address for 6 months or longer is included even if she has his or her main residence elsewhere. Addresses used only as second homes are never counted as a main residence.

The following table shows some details for the 2009 cross-sectional operation on income data for each country concerning the reference period for income, for taxes income and social insurance and taxes on wealth, as well as lag between the income reference period and current variable.

**Table 13:** Income reference period by country (2009)

Country	Income reference period (year)	The reference period for taxes on income and social insurance	Taxes on wealth	Lag between income ref. period and current variable (month)
BE	2008	2008	na	4-12
BG	2008	2008	2008	4-7
CZ	2008	2008	2008	3-4
DK	2008	2008	2008	4-6
DE	2008	2008	2008	4-8
EE	2008	2008	2008	3-7
EL	2008	2008	2008	3-6
ES	2008	2008	2008	2-6
FR	2008	2007	1/01/2008	5-6
IT	2008	2008	2008	10
CY	2008	2008	2008	3-7
LV	2008	2008	2008	3-7
LT	2008	2008	2008	4-8
LU	2008	2008	na	1-7
HU	2008	2008	2008	3
MT	2008	2008	na	6 -10
NL	2008		na	5-9
AT	2008	2008	na	4-10
PL	2008	2008	2008	5
PT	2008	2008	2008	4-7
RO	2008	2008	2008	NA
SI	2008	2008	2008	2-6
SK	2008	2008	2008	4
FI	2008	2008	2008	0-5
SE	2008	2008	na	12
UK	Centred around interview date	Centred around interview date	Financial years April08-March09 April09-March10	0
IS	2008	2008	2008	4 and half
NO	2008	2008	2008	0-6
CH	2008	2008	2008	3-7

Source: National Intermediate Quality Reports 2009

The main conclusion is that the reference period for both income and taxes is the previous calendar year for all countries having sent their 2009 national quality report except for the United Kingdom:

- Income reference period and reference period for taxes on income and social insurance contributions: United Kingdom (centred around the interview date<sup>8</sup>).
- Reference period for taxes on wealth: the United Kingdom (based on data provided for the financial years April 2008 – March 2009 and April 2009 – March 2010).

Let us point out that the 2009 national quality report has not yet been received from Ireland where the income reference period and the reference period for taxes on income and social insurance contributions seem to be the 12 months prior to the interview date.

## 2.2. Components of income

This section summarises some findings on three important issues: the income components by country, the non-monetary income components and the mode of collection of self-employment income.

### 2.2.1. Income components by country

The following tables provide an overview for the 2009 operation of the income components by country, both for household and for personal income components.

The information has been gathered from the national quality reports and direct exchanges with countries. When there is no information on a given variable in the national quality report, Eurostat has assumed that the country follows the standard definition, i.e. it is fully comparable. This assumption should be taken into account when analysing the data as it limits its validity.

**Table 14:** Household income components: are the standard EU-SILC definitions used? Number of countries in each comparability level by income component (2009 operation)

	Fully comparable	Largely comparable	Partly comparable	Not collected
Total hh gross income (HY010)	26	1	:	:
Total disposable hh income (HY020)	27	:	:	:
Total disposable hh income before social transfers other than old-age and survivors' benefits (HY022)	27	:	:	:
Total disposable hh income before all social transfers (HY023)	27	:	:	:
Imputed rent (HY030)	26	:	1	;
Income from rental of property or land (HY040)	26	1	:	:
Family/ Children related allowances (HY050)	24	3	:	:
Social exclusion payments not elsewhere classified (HY060)	26	1	:	:
Housing allowances (HY070)	23	3	:	1
Regular inter-hh cash transfers received (HY080)	24	4	:	:
Interest, dividends, profit from capital investments in incorporated businesses (HY090)	26	1	:	:

Interest paid on mortgage (HY100)	26	:	:	1
Income received by people aged under 16 (HY110)	26	1	:	:
Regular taxes on wealth (HY120)	24		:	3
Regular inter-hh transfers paid (HY130)	23	4	:	:

Source: National Intermediate Quality Reports 2009

The main conclusions from the table on household income components are the following: the standard EU-SILC definitions are used in the majority of case and only three variables (HY070, HY100 and HY120) are not recorded in some countries. See the annex 3 in order to have a detailed overview by country.

**Table 15:** Individual income components: are the standard EU-SILC definitions used? Number of countries in each comparability level by income component (2009 operation)

	Fully comparable	Largely comparable	Partly comparable	Not collected
Cash or near-cash employee income (PY010)	22	5	:	:
Other non-cash employee income (PY020)	26	1	;	:
Income from private use of company car (PY021)	25	:	:	2
Employers' social insurance contributions (PY030)	23	2	:	2
Cash profits or losses from self-employment (PY050)	22	5	:	
Value of goods produced for own consumption (PY070)	20	1	1	5
Unemployment benefits (PY090)	23	4	:	:
Old-age benefits (PY100)	26	1	:	:
Survivors' benefits (PY110)	25	2	:	:
Sickness benefits (PY120)	24	3	:	:
Disability benefits (PY130)	26	1	:	:
Education-related allowances (PY140)	25	2	:	:
Gross monthly earnings for employees (PY200)	9	1	:	17

Source: National Intermediate Quality Reports 2009

The EU-SILC standard definitions are not used in all countries for the income components. However, all the variables are recorded even if with a different level of comparability in all countries with the exception of four variables (PY021, PY030, PY070 and PY200). See the annex 3 for details and comments from countries.

### *2.2.2. Mode of collection and recording of self-employment income*

This section details the form of collection and recording of one important income component, namely the self-employment income.

The following table shows for the 2009 operation the percentage of individuals receiving self-employment income, missing cases (where it could not be imputed and/or converted to gross amount), and the number receiving and recording the amount. This recording is always in the gross form. The last column of this table shows the number of cases where the net amount (in some form) has also been recorded.

**Table 16:** Number and percentage of persons recorded with self-employment income (SEI), by country (2009)

	(A)	(B)	(C=B/A)	(D)
	Total persons aged 16+	Persons receiving SEI (gross value) and recorded	%	Persons with also net SEI recorded
<b>BE</b>	11 767	719	6.1	719
<b>BG</b>	13 150	753	5.7	753
<b>CZ</b>	19 765	1 562	7.9	:
<b>DK</b>	11 813	3 200	27.1	:
<b>DE</b>	23 832	1 165	4.9	:
<b>EE</b>	11 308	812	7.2	737
<b>IE</b>	9 902	825	8.3	825
<b>EL</b>	15 045	2 753	18.3	2 413
<b>ES</b>	30 836	2 255	7.3	2 255
<b>FR</b>	20 232	978	4.8	978
<b>IT</b>	43 111	6 790	15.8	6 790
<b>CY</b>	7 557	896	11.9	5
<b>LV</b>	12 207	595	4.9	595
<b>LT</b>	11 214	886	7.9	886
<b>LU</b>	8 625	468	5.4	456
<b>HU</b>	20 973	2 167	10.3	:
<b>MT</b>	8 485	570	6.7	:
<b>NL</b>	18 254	1 885	10.3	:
<b>AT</b>	11 062	1 183	10.7	1 183
<b>PL</b>	31 674	3 420	10.8	3 174
<b>PT</b>	11 101	935	8.4	935
<b>RO</b>	16 282	1 953	12.0	1 953
<b>SI</b>	25 386	3 737	14.7	3 737
<b>SK</b>	13 821	748	5.4	:
<b>FI</b>	20 106	3 733	18.6	:
<b>SE</b>	14 866	2 159	14.5	2 159
<b>UK</b>	15 646	1 173	7.5	:
<b>IS</b>	6 521	666	10.2	:
<b>NO</b>	10 620	1 065	10.0	:

Source: Micro-database (March 2011)

The main conclusions from this table are the following:

- The percentage of persons aged above 16 that are receiving self-employment income is above 15% in four countries: Denmark (27.1%), Finland (18.6%), Greece (18.3%) and Italy (15.8%), while it is below 5% in three countries: Germany, France and Latvia.
- For five countries the number of persons receiving self-employment income differs when looking at gross or net data (i.e. column B and column D in table 16) with gross

data greater than net data. These countries are: Estonia (75), Greece (340), Cyprus (891), Luxembourg (12) and Poland (246).

Additionally, the table below shows (still for the 2009 operation) the income amount recorded gross or net according to the form in which the amount was collected. This indicates the extent and form of net-gross conversion, normally involving micro-simulation.

**Table 17:** Number of persons recorded with a gross and/or a net self-employment income (SEI), according to the way the amount was collected and recorded, by country (2009)

Cash benefits or losses from self-employment – gross value (PY050G_F)		Cash benefits or losses from self-employment – net value (PY050N_F)		
Collected:		Collected and recorded:		
<b>EL</b>	Net of tax on income at source and social contributions (100%)	<b>EL</b>	Net of tax on income at source and social contributions (100%)	
<b>IT</b>				
<b>PL</b>				
<b>RO</b>				
<b>FR</b>	Net of tax on social contributions (100%)	<b>FR</b>	Net of tax on social contributions (100%)	
<b>SE</b>		<b>SE</b>	Net of tax on income at source but recorded at net of tax on income at source and social contribution (100%)	
<b>SK</b>	Net of tax on income at source (100%)	<b>SK</b>	Net not recorded	
<b>DK</b>	Gross (100%)	<b>DK</b>		
<b>DE</b>				
<b>HU</b>				
<b>MT</b>				
<b>NL</b>				
<b>FI</b>				
<b>UK</b>				
<b>IS</b>				
<b>NO</b>				
<b>BE</b>		Net of tax on income at source and social contributions (100%)		<b>BE</b>
<b>BG</b>				
<b>ES</b>				
<b>LV</b>				
<b>LU</b>				
<b>SI</b>				
<b>AT</b>	Collected and recorded at net of tax on income at source and social contributions & collected gross but recorded at net of tax on income source and social contributions	<b>IE</b>		
<b>IE</b>		<b>PT</b>	Several modes of collection and recording	
<b>PT</b>	Net of tax on income at source and social contributions & Gross	<b>CY</b>	Net of tax on income at source and social contributions (100%)	
<b>CY</b>		<b>LT</b>	Collected and recorded at net of tax on income at source and social contributions & collected gross but recorded at net of tax on income at source and social contributions	
<b>LT</b>		<b>EE</b>	Net not recorded	
<b>EE</b>		<b>CZ</b>		
<b>CZ</b>		Net of tax on social contributions & Gross	<b>CH</b>	Collected and recorded at net of tax on social contributions & collected gross but recorded at net of tax on income at source and social contributions
<b>CH</b>				

Source: Micro-database (March 2011)

The main conclusions from this table are the following:

- Seven countries (Belgium, Bulgaria, Spain, Latvia, Luxembourg, Austria and Slovenia) collected both the gross and the net values of the self-employment income and recorded it in the micro-database.
- Eleven countries (the Czech Republic, Denmark, Germany, Cyprus, Hungary, Malta, the Netherlands, Finland, the United Kingdom, Iceland and Norway) did not record in the micro-database the net values for the persons for which a gross value was collected; these countries do not make use of a gross/net conversion to obtain a net value of the self-employment income.

### 3. COHERENCE

The coherence of two or more statistical outputs refers to the degree to which the statistical processes, by which they were generated used the same concepts – classifications, definitions, and target populations – and harmonised methods<sup>9</sup>.

The information presented in this section of the national quality report varies greatly among countries. Denmark, Malta and Belgium only explained that they did coherence studies but did not present the results of these studies in their national quality report. Germany presents a list of tables without comments.

The main sources for comparisons are the Household Budget Survey (HBS), the Labour Force Survey (LFS) and the National Accounts. In addition, some countries compared the data with administrative sources or even with other sources.

**Table 18:** Coherence studies between EU-SILC and external sources carried out by country

	Comparison with:					
	Labour Force Survey	Household Budget Survey	National Accounts	Administrative sources	Previous EU-SILC 2008	Other sources
BE	:	:	:	:	:	X
BG	X	X	:	X	X	X
CZ	:	:	X	X	:	:
DK						
DE	:	X	:	:	X	:
EE	X	:	X	X	X	X
IE	:	:	:	:	:	:
EL	X	X	:	X	X	X
ES	X	:	X	X	X	:
FR	:	:	:	:	:	X
IT	X	:	X	X	:	:
CY	X	:	:	:	X	X
LV	X	X	:	X	:	X
LT	X	X	:	X	:	X
LU	:	:	:	:	:	:
HU	X	:	:	:	X	
MT	X	:	X	X	X	X
NL	:	:	:	:	X	X
AT	:	:	X	:	X	X
PL	:	X	X	:	X	:
PT	:	X	:	:	:	:
RO	:	X	:	:	:	:
SI	X	X	X	:	X	X

<sup>9</sup> ESS Standard for quality reports (ESQR)

<b>SK</b>	X	X	:	X	X	X
<b>FI</b>	X	:	X	X	X	X
<b>SE</b>	:	:	:	:	:	:
<b>UK</b>	:	:	:	:	X	X
<b>IS</b>	:	:	:	:	:	:
<b>NO</b>	:	:	:	:	:	:
<b>CH</b>		X	:	:	:	:

Source: National Intermediate Quality Reports 2009

The majority of countries performed coherence studies based on 2009 SILC data. The only exceptions are: on the one hand, Luxembourg because of the difficulties to gather income information on ‘cross-border’ workers and international officials; and on the other hand, some register countries (Sweden, Norway and Iceland) because EU-SILC data already come from registers.

The main conclusions from this table are the following:

- Ten countries compared data with HBS, thirteen with LFS and nine with National Accounts.
- Nine Member States did comparison with administrative sources.
- Eleven countries compared 2009 data with previous years, mainly with 2008 data.
- Fifteen countries carried out coherence studies with other national sources.

The regulation 1177/2003 calls for a comparison between EU-SILC and external sources for all income target variables and the number of people who receive income from each income component. Nonetheless some countries carried out coherence studies based not only on income variables. The tables hereafter present some information about the coherence studies performed by countries, when explicitly referring to the variables concerned.

**Table 19:** Coherence study with LFS

	Notes	Variables (or topics) used in the coherence study
<b>BG</b>	No comment	Highest ISCED level attained (PE040), Self-defined current economic status (PL030), Status in employment (PL040)
<b>EE</b>	Most of the differences are minor in case of education level and less than 1% may be due to misclassification to other inactive category in LFS	Education level (ISCED) and self-defined activity status (PL030)
<b>EL</b>	No comment	Self-defined current economic status (PL030), Number of hours usually worked per week in main job (PL060), Number of persons working at the local unit (PL130), Status in employment (PL040), Highest ISCED

		level attained (PE040), Occupation (ISCO-88 COM) (PL050), Economic activity (PL110), household size, Person has ever worked (PL015), Number of persons working less than 30 hours per week (PL120), Type of contract (PL140). A comparison of labour participation is included as well.
<b>ES</b>	In the ES SILC there is some underreporting of the number of persons in employment.	Activity status
<b>IT</b>	In LFS a worker is classified as an independent on the basis of his/her main activity. The SILC estimate is referred to the number of people whose earnings from self –employment may have been temporary and/or from a secondary working activity.	Cash benefit or losses from self-employment (PY050N)
<b>CY</b>	There is one main methodological difference between the two surveys, for LFS students studying abroad or National guards are not considered to be part of the population, whereas they are part of the EU-SILC population.	Labour force participation rates by age
<b>LV</b>	Main activity status is entirely self-defined in the EU-SILC at the time of interview, whereas in the LFS the self-defined activity status refers to the last three months	Employees 16-74 years monthly net wages, education level
<b>LT</b>	No comment	Self-defined current economic status (PL031)
<b>SI</b>	No comment	Self-defined activity status(PL031)
<b>HU</b>	Labor force data on the activity status of the population was used for the calibration and output comparison as well.	Self-defined current economic status by gender
<b>SK</b>	No comment	Education, self-defined activity status (PL031), Status in employment (PL040), Occupation(ISCO-88 COM) (PL050), NACE REV.2 (PL111)
<b>FI</b>	The differences between the EU-SILC self-defined current activity status (PL031) and the LFS activity status are logical to their definitions because LFS uses ILO concept which is more detail in relation to the employment and unemployment definitions. EU-SILC target persons refer to private household persons aged 16-64, whereas in LFS they refer to all persons aged 15-64. There are also differences in reference time periods which may explain the differences between the variable frequencies. The sampling and weighting methods differ between the surveys, which affect the figures to a some extent.	Education, self-defined activity status (PI031), Available for work (PL025), Status in employment (PL040), Occupation (ISCO-88 COM) (PL050), NACE REV.2 (PL111)

Source: National Intermediate Quality Reports 2009

## Annex 1: EU-SILC countries

**Table 20:** EU-SILC implementation by country

Countries	2003	2004	2005	2006	2007	2008	2009	2010	2011
EU-27									
Belgium									
Bulgaria									
Czech Republic									
Denmark									
Germany									
Estonia									
Ireland									
Greece									
Spain									
France									
Italy									
Cyprus									
Latvia									
Lithuania									
Luxembourg									
Hungary									
Malta									
Netherlands									
Austria									
Poland									
Portugal									
Romania									
Slovenia									
Slovakia									
Finland									
Sweden									
United Kingdom									
Croatia									
FYROM									
Iceland									
Turkey									
Norway									
Switzerland									
Serbia									



Full implementation  
Test implementation

## **Annex 2: Sampling design**

**This annex presents information on sampling design used in each country for EU-SILC 2009 operation.**

### **Belgium**

#### ***Type of sampling design***

The EU-SILC BE 2009 survey is based on stratified two-stage sampling design.

#### ***Primary and secondary sample unit***

The Primary sample units (PSUs) are the municipalities or parts thereof in the larger ones. The secondary sample units (SSUs) are the private households.

#### ***Stratification criteria***

The stratification is done by the geographical criteria (NUTS2) into 11 strata (10 Belgian provinces and the Brussels Capital Region).

#### ***Sample selection scheme***

In each stratum, PSUs are firstly descending sorted by average income, next a fixed number of times a PSU is drawn according to a systematic PPS (probability proportional to size) selection scheme where size is measured as the number of private households. SSU is selected by systematic sampling, after sorting the households in selected PSUs by age of reference person.

#### ***Sample distribution over time***

No information is provided

#### ***Renewal of sample***

Belgium has adopted the 4-year rotational design recommended by Eurostat.

### **Bulgaria**

#### ***Type of sampling design***

The EU-SILC BG 2009 survey is a stratified two-stage cluster sampling design.

#### ***Primary and secondary sample unit***

The Primary sample units (PSUs) are the census enumeration units. The secondary sample unit (SSUs) are the households.

#### ***Stratification criteria***

The stratification is done by administrative-territorial districts in the country (NUTS3) and the household's location into 56 strata (28 of urban and 28 of rural population). Municipalities and settlements are ranged according to the number of their population within each stratum.

#### ***Sample selection scheme***

The clusters on the first stage are chosen with probability proportional to the population size (number of households) in the PSUs. Systematic sampling of SSU (households) in each primary unit selected is applied. Each PSU contain 5 households.

### ***Sample distribution over time***

As the survey is annual, the sample of household is not distributed over time.

### ***Renewal of sample***

Bulgaria has adopted the 4-year rotational design recommended by Eurostat.

## **Czech Republic**

### ***Type of sampling design***

The EU-SILC CZ 2009 survey is a stratified two-stage sampling design.

### ***Primary and secondary sample unit***

The primary sample units (PSUs) are the census enumeration district (CEUs).

The secondary sample units (SSUs) are the dwelling.

### ***Stratification criteria***

The stratification is done by geographical criteria (NUTS4) and the municipality size (below 2 000 inhabitants; 2 000-9 999 inhabitants; 10 000 – 49 999 inhabitants and 50 000 and more inhabitants).

### ***Sample selection scheme***

PSUs were sampled with probability proportional to size (number of dwellings). Simple random sampling without replacement is used for sampling of constant number of 10 dwellings in the sampling frame.

### ***Sample distribution over time***

The survey was organized as a one-shot survey due to the limited duration of the fieldwork period. Sample was not distributed into separated waves over the duration of the fieldwork.

### ***Renewal of sample***

Czech Republic has adopted the 4-year rotational design recommended by Eurostat.

## **Denmark**

### ***Type of sampling design***

The EU-SILC DK 2009 survey is based one-stage simple random sampling design.

### ***Primary and secondary sample unit***

The sampling units are the individuals.

The household is defined as the household of which the selected person is member at the beginning of the survey year (1 January).

### ***Stratification criteria***

Not applicable.

### ***Sample selection scheme***

Not applicable.

### ***Sample distribution over time***

Not applicable.

### ***Renewal of sample***

Denmark has adopted the 4-year rotational design recommended by Eurostat.

## **Germany**

### ***Type of sampling design***

The EU-SILC DE 2009 survey is based on a stratified random sampling design, from former participants of the German Microcensus survey.

### ***Primary and secondary sample unit***

The sampling unit is the private household.

### ***Stratification criteria***

The stratification is done by geographical criteria (federal state), household type, social status of the main income earner, household net income and farm household (separate stratum for each federal state).

### ***Sample selection scheme***

Households were selected with simple random sampling within each stratum.

### ***Sample distribution over time***

No information is provided.

### ***Renewal of sample***

Germany has adopted the 4-year rotational integrated design recommended by Eurostat.

## **Estonia**

### ***Type of sampling design***

The EU-SILC EE 2009 survey is based on one-stage stratified sampling design, with systematic sampling of persons in each stratum.

### ***Primary and secondary sample unit***

Households are regarded as sampling units although selection was made using a sample of persons aged over 14 (so-called address-persons).

### ***Stratification criteria***

The stratification is done by geographical criteria and population size into three strata (big counties, small counties and Hiiu County).

### ***Sample selection scheme***

A systematic sampling of address-persons was used with foregoing sample sizes in each stratum. For households this procedure results in unequal probability sampling with inclusion probabilities proportional to household size (number of person aged 14+). It is because a sample of persons aged 14 and over is selected first with equal probabilities within strata, and then the household of the selected person is identified, and all eligible persons in the household are interviewed.

### ***Sample distribution over time***

Fixed income reference period was used and therefore the sample was not principally divided into months or weeks.

***Renewal of sample***

Estonia has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Ireland</b>
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The IE 2009 intermediate quality report has not been yet delivered to Eurostat (on 30 June 2011).

<b>Greece</b>
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***Type of sampling design***

The EU-SILC EL 2009 survey is based on stratified two-stage sampling design.

***Sampling unit***

The primary sample units (PSUs) are the areas (one or more unified building blocks).

The secondary sample units (SSUs) are the households.

***Stratification criteria***

There are two levels of stratifications: a geographical stratification (NUTS2) into 13 standard administrative regions at the first stage and next within each NUTS2 according to degree of urbanization and population size. The total number of strata was 90.

***Sample selection scheme***

At the first stage: PSUs are selected with probability proportional to size (number of households).

At second stage: a systematic sample of dwelling is selected with equal probabilities. However, there is one to one relation between household and dwelling. If the selected dwelling constitutes of one or more households then all of them re interviewed.

***Sample distribution over time***

As the survey is annual the sample of households is not distributed over time.

***Renewal of sample***

Greece has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Spain</b>
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***Type of sampling design***

The EU-SILC ES 2009 survey is based on stratified two-stage sampling design, with systematic sampling of dwellings in each PSU.

***Primary and secondary sample unit***

The primary sample units (PSUs) are census sections.

The secondary sample units (SSUs) are the principal family addresses selected for the sample in the census section.

### ***Stratification criteria***

The stratification is done by the size of the municipality to which the census section belonged into 7 strata at first stage.

### ***Sample selection scheme***

Census sections were selected in each stratum with a probability proportional to size (family dwellings). In each section, addresses were selected with equal probability with systematic sampling initiated at random. Dwellings were sorted in random order before systematic selection was carried out. All households usually residing in those addresses were surveyed. This procedure produces self-weighted samples in each stratum.

### ***Sample distribution over time***

Fixed income reference period was used and therefore the sample was not principally divided into months or weeks.

### ***Renewal of sample***

Greece has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>France</b>
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### ***Type of sampling design***

The EU-SILC FR 2009 survey is based on stratified multi-stage sampling design, with systematic sampling of dwellings in second phase for urban areas or in third phase for rural areas.

### ***Primary and secondary sample unit***

The primary sample units (PSUs) are the municipalities.

The secondary sample units (SSUs) are dwellings in urban areas and group of municipalities in rural areas.

The ultimate sample units (USUs) are the dwellings.

All the households living in the selected dwellings were interviewed.

### ***Stratification criteria***

The stratification is done by the type of area (urban, rural) and size of the municipality into 5 strata (rural area; municipality with less than 20 000 habitants; municipality with a number of habitants between 20 000 and 100 000; municipality with more than 100 000 habitants and Paris). A sub-stratification is done in the first three strata by NUT2. At second stage, another sub-stratification is done in the last three strata by group of municipalities in order to have certain size in each sub-stratum. Finally, the last stratification is done by type of dwelling (main residence, secondary residence, holiday house, new dwelling) at the third stage only in rural areas.

### ***Sample selection scheme***

PSUs were selected with probability proportional to the size (number of main residence in each stratum) in the first three strata - no selection in the other two strata - and SSUs with systematic selection in the urban areas. Ad-hoc groups of municipalities were selected systematically in the rural areas at the second stage. The third stage exists only in the rural areas and the dwellings were selected systematically.

### ***Sample distribution over time***

No information is provided in the National quality report

***Renewal of sample***

France EU-SILC sample consists of nine rotational groups, each one is included in the panel for nine years.

<b>Italy</b>
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***Type of sampling design***

The EU-SILC IT 2009 survey is based on stratified two-stage clustered sampling design, with systematic sampling of households from municipalities.

***Primary and secondary sample unit***

The primary sample units (PSUs) are the municipalities.

The secondary sample units (SSUs) are the households.

The final sample unit is the household.

Use of clustering: Municipalities are clusters of households, households are cluster of individuals.

***Stratification criteria***

Stratification of PSU is done by the number of inhabitants in order to have an approximately constant number of inhabitants in each stratum. SSUs are not stratified.

***Sample selection scheme***

PSUs are selected with probability proportional to their size (number of residents) by systematic sampling method (Madow) in each stratum. Households are selected with equal probability by systematic sampling in each selected municipality from municipality-registers.

***Sample distribution over time***

The sample is not distributed over time.

***Renewal of sample***

Italy has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Cyprus</b>
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***Type of sampling design***

The EU-SILC CY 2009 survey is based on one-stage stratification sampling.

***Primary and secondary sample unit***

The sampling units are private households.

***Stratification criteria***

Stratification is done by geographical criterion into 9 strata.

***Sample selection scheme***

The sample was selected from each stratum with simple random sampling.

***Sample distribution over time***

See the 2009 national intermediate quality report available on Eurostat website.

### ***Renewal of sample***

Cyprus has adopted the 4-year rotational integrated design recommended by Eurostat.

## **Latvia**

### ***Type of sampling design***

The EU-SILC LV 2009 survey is based on stratified two-stage sampling design, with systematic sampling of PSUs within each stratum.

### ***Primary and secondary sample unit***

The primary sample units (PSUs) are the Population Census areas.

The secondary sample units (SSUs) are dwellings.

In Latvia more than one household can live in one dwelling. All households and individuals living in the selected dwellings were included in EU-SILC survey in urban areas, but in rural areas only those households for which the household members were included in the Household List (See the national quality report for more details).

### ***Stratification criteria***

The stratification is done by degree of urbanization into four strata (Riga, six largest towns, other towns and rural areas). The Classification of Administrative Territories and Territorial units (CATTU) was used for stratification.

### ***Sample selection scheme***

PSU is selected with systematic sampling with probabilities proportional to their population size.

SSU was selected with simple random sampling without replacement.

### ***Sample distribution over time***

A sample distribution over time was not used because the EU-SILC survey is organised on annual basis.

### ***Renewal of sample***

Latvia has adopted the 4-year rotational integrated design recommended by Eurostat.

## **Lithuania**

### ***Type of sampling design***

The EU-SILC LT 2009 survey is based on stratified simple random design.

### ***Primary and secondary sample unit***

Households are considered as sampling units although selection was made using a sample of persons.

### ***Stratification criteria***

The stratification is done by the degree of urbanization into 7 strata (5 largest cities, other cities and rural area).

### ***Sample selection scheme***

Simple random sample was used to select the person's address. Households where the selected person lives are surveyed.

***Sample distribution over time***

Fixed income reference period was used and therefore the sample was not principally divided into months or weeks.

***Renewal of sample***

Lithuania has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Luxembourg</b>
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***Type of sampling design***

The EU-SILC LU 2009 survey is based on stratified simple random design.

***Primary and secondary sample unit***

The primary sampling units (PSUs) are the fiscal households.

***Stratification criteria***

The stratification is done by household size, status of activity (active, retired) and sector of activity (public, private, self-employed) into 18 strata.

***Sample selection scheme***

The total sample is made by six longitudinal samples of individuals and 18 simple random samples of "fiscal" households.

***Sample distribution over time***

The sample is not distributed over time due to the panel structure of the sample.

***Renewal of sample***

Luxembourg uses a pure panel.

<b>Hungary</b>
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***Type of sampling design***

The EU-SILC HU 2009 survey is based on different stratified sampling designs: the rotation groups 5 and 7 have a stratified two-stage sample design in a part of the population (Part I, Type I) and a stratified one-stage sample design on the other part of the population (Part II, Type II). Groups 6 and 8 have a stratified three-stage sample design in a part of the population (Part III, Type III) and a stratified two-stage sample design in the other part of the population (Part IV, Type IV).

Part II / Part IV consist of mostly the biggest localities and Part I/Part III consists of the rest.

***Primary and secondary sample unit***

Type I: PSUs are localities

SSUs are dwellings

Type II: PSUs are dwellings

Type III: PSUs are localities

SSUs are enumeration districts

Type IV: PSUs are enumeration districts

SSUs are households

The final sampling unit is the household.

***Stratification criteria***

Localities were stratified by size (number of dwellings) in the rotation group 5 and 7 and by county and category of size for the rotation group 6 and 8. Within selected localities the household were stratified by the characteristics of the head of household.

Strata with one locality constitute the part of the population where we have one stage sample design (type II and strata with more than one locality constitute the other part (type I, type III and type IV).

***Sample selection scheme***

Localities were selected with probability proportional to size where size is measured by the number of dwellings. Dwellings in selected locality were selected systematically. For type III and Type IV localities and enumeration districts were selected with PPS where size is measured by the number of dwellings. Households were selected in a simple random way.

***Sample distribution over time***

See the 2009 intermediate national quality report available on Eurostat website

***Renewal of sample***

Hungary has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Malta</b>
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***Type of sampling design***

The EU-SILC MT 2009 survey is based on one-stage simple sampling design.

***Primary and secondary sample unit***

The sampling units are private households.

***Stratification criteria***

Not applicable

***Sample selection scheme***

Simple random sampling was used to select the list of dwellings.

***Sample distribution over time***

Data collection was carried out between July and October 2009, with the sample being spread t over the four months.

***Renewal of sample***

Malta has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>The Netherlands</b>
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***Type of sampling design***

The EU-SILC NL 2009 survey is based on stratified two-stage sampling design, from two sets of addresses: the first part with households which participated in LFS survey and willing to

cooperate also to EU-SILC survey and the second part with all residents aged 65 years and over.

***Primary and secondary sample unit***

The primary sample unit (PSU) is the municipality.

The secondary sample unit (SSU) is the address.

All households on selected addresses are eligible for the survey, up to of three households per address. For the measurement of detailed information on social variables one member of the household aged 16 and over is selected.

***Stratification criteria***

Stratification is done by geographical criteria (NUTS3) into 40 strata.

***Sample selection scheme***

At the first stage sample is selected with PPS where size is the number of addresses per municipality. At the second stage the selection is done by simple random sampling.

***Sample distribution over time***

Fixed income reference period was used and therefore the sample was not principally divided into months or weeks.

***Renewal of sample***

The Netherlands has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Austria</b>
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***Type of sampling design***

The EU-SILC AT 2009 survey is based on stratified two-stage probability sample without replacement.

***Primary and secondary sample unit***

The sampling units are dwellings but the primary and the secondary sample units vary in each stratum

Main Stratum 1        PSUs are households

Main Stratum 2        PSUs are Grid cells

SSU are households

Main Stratum 3        PSUs are Municipalities

SSUs are households

***Stratification criteria***

The stratification is done by the geographical criteria into 3 main strata:

Main-stratum 1: addresses in interviewer units (Sprengel) with a populated area of less than 50 km<sup>2</sup>. Main-stratum 2: addresses in interviewer units (Sprengel) with a populated area of at least 50 km<sup>2</sup> and high population density.

Main-stratum 3: addresses in interviewer units (Sprengel) with a populated area of at least 50 km<sup>2</sup> and low population density.

***Sample selection scheme***

For each of the three main strata a distinct sampling design was applied:

Main-stratum 1: one-stage stratified sampling  
Main-strata 2 and 3: two-stage stratified sampling

***Sample distribution over time***

See the 2009 intermediate national quality report available on Eurostat website.

***Renewal of sample***

Austria has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Poland</b>
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***Type of sampling design***

The EU-SILC PL 2009 survey is based on stratified two-stage sampling design.

***Primary and secondary sample unit***

The primary sample units (PSUs) are the enumeration census areas.

The secondary sample units (SSUs) are dwellings.

All the households from the selected dwellings are supposed to enter the survey.

***Stratification criteria***

Stratification is done by geographical criteria (NUTS2, NUTS3, NUTS4 and NUTS5) into 211 strata.

***Sample selection scheme***

Census areas were selected according to the Hartley-Rao scheme. Prior to selection, census areas were put in random order for each stratum separately and then the determined number of PSUs was selected with probabilities proportional to the number of dwellings. Then in each of the census area belonging to the PSU sample dwellings were selected using the simple random selection procedure.

***Sample distribution over time***

No information is provided

***Renewal of sample***

Poland has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Portugal</b>
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***Type of sampling design***

The EU-SILC PT 2009 survey is based on stratified multi-stage clustered sampling design.

***Primary and secondary sample unit***

The primary sample unit (PSU) is the area of the Master sample (made of census enumeration areas).

The secondary sample unit (SSU) and the ultimate sample unit (USU) are dwellings. All the households and therefore all the persons living in the same dwelling are interviewed.

***Stratification criteria***

PSUs are stratified by NUT 3 but for EU-SILC purposes a sub-sample of areas was selected independently in each NUTS 2.

### ***Sample selection scheme***

542 areas were drawn systematically with a sampling interval given as the ratio between the number of areas defined to the EU-SILC and the number of areas in the Master sample.

The dwellings were selected in block in order to reduce the travel cost. In each area the dwellings are arranged according to their census enumeration and the first dwelling of the block was selected at random and we assume that all dwellings have equal probability of being selected.

### ***Sample distribution over time***

No information

### ***Renewal of sample***

Portugal has adopted the 4-year rotational integrated design recommended by Eurostat with four subsamples equal in size.

## **Romania**

### ***Type of sampling design***

The EU-SILC RO 2009 survey is based on stratified two-stage clustered sampling design.

### ***Primary and secondary sample unit***

The primary sample units (PSUs) are the census enumeration areas.

The secondary sample units (SSUs) are the dwellings.

All the households within each dwelling are included in the sample.

### ***Stratification criteria***

Stratification is done by regional criteria (NUTS3) and degree of urbanization (urban or rural area) into 88 strata at the first stage

### ***Sample selection scheme***

PSUs were sampled with stratified random sample with probability proportional to size (number of permanent dwellings).

SSUs are systematically selected from EMZOT (Multifunctional Sample of Territorial Areas).

### ***Sample distribution over time***

The sample is not distributed over time.

### ***Renewal of sample***

Romania has adopted the 4-year rotational integrated design recommended by Eurostat.

## **Slovenia**

### ***Type of sampling design***

The EU-SILC SI 2009 survey is based on two-stage stratified sampling design, with systematic sampling of enumeration areas within each stratum.

### ***Primary and secondary sample unit***

The primary sample units (PSUs) are constructed on the basis of census enumeration areas. The secondary sample units (SSUs) are individuals. The selected person is also the sample person, other households members are not sample persons.

***Stratification criteria***

Stratification is done by size of the settlement and the proportion of agricultural households in the settlement into 6 strata. Each stratum was sorted by NUTS3.

***Sample selection scheme***

In each stratum PSUs were systematically selected. 7 persons aged 16 years and over were selected in each PSUs at the second stage.

***Sample distribution over time***

See National Intermediate quality report 2009.

***Renewal of sample***

Slovenia has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Slovakia</b>
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***Type of sampling design***

The EU-SILC SK 2009 survey is based on one-stage stratified sampling design.

***Primary and secondary sample unit***

The primary sample units (PSUs) are the household

***Stratification criteria***

Stratification is done by regional criterion (NUTS3) and by degree of urbanization in 48 strata.

***Sample selection scheme***

Random numbers from interval (0,1) were generated in each strata for each unit, which was not included in sampling in previous year. Units with random number lower or equal than was probability of sampling were included into sampled population.

***Sample distribution over time***

The sample is not distributed over time.

***Renewal of sample***

Slovakia has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Finland</b>
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***Type of sampling design***

The FI EU-SILC 2009 survey is based on two-phase stratified sampling design.

***Primary and secondary sample unit***

The primary sample units (PSU) are persons. In the first phase persons are selected (target persons), in the second phase the persons together with their household-dwelling units are selected.

### ***Stratification criteria***

Stratification is done by socio-economic categorisation of the household-dwelling units (wage earners, entrepreneurs, farmers, pensioners, others and information on taxable income level, 13 strata).

### ***Sample selection scheme***

In the first phase, a master sample of persons is selected with systematic sampling from the population register data ordered by the domicile code. Household-dwelling units are constructed by adding persons sharing the same domicile code with the selected persons to the master sample. In the second phase, the SILC sample of household-dwelling units is selected from the stratified master sample with simple random sampling without replacement within every stratum and using non-proportional allocation.

### ***Sample distribution over time***

The sample refers to the end (31 Dec) of the year before the survey year. In SILC 2009 operation, the fieldwork period started in January 2009 and ended in May 2009. See the national quality report for details about the distribution of interviews through time in the 2009 survey.

### ***Renewal of sample***

Finland has adopted two-year rotational group design for the cross-sectional survey. Sampling design is partly integrated with the longitudinal survey. 1/3 of the new rotation group selected proportionally to the size within strata is interviewed in four years in the longitudinal survey.

## **Sweden**

### ***Type of sampling design***

The EU-SILC SE 2009 survey is based on systematic sampling design.

### ***Primary and secondary sample unit***

The primary sample units (PSUs) are the individuals.

The Sweden survey takes the selected person as the unit of study.

### ***Stratification criteria***

Not applicable

### ***Sample selection scheme***

The sample was drawn as a systematic sample from the register of total population (TPR) sorted by age.

### ***Sample distribution over time***

In SILC 2009 operation, the fieldwork period started on 5 February 2009 and ended on 31 December 2009.

### ***Renewal of sample***

Sweden has adopted the 4-year rotational integrated design recommended by Eurostat.

## **United Kingdom**

### ***Type of sampling design***

For Great Britain, the EU-SILC UK 2009 survey is based on stratified two-stage sampling design. The sample design in Northern Ireland (NI) is a simple random sample.

***Primary and secondary sample unit***

The primary sample units (PSUs) are the postcode sectors.

The secondary sample unit (SSU) are addresses within those sectors.

***Stratification criteria***

Stratification of the postcode sectors is done by geographical criteria for GB (based on the 10 Government Office regions in England, 5 subdivisions in Scotland, 2 in Wales and 1 in Northern Ireland) into 31 strata (30 strata correspond to Great Britain, whereas the stratum with identifier 31 corresponds to Northern Ireland). There is no additional stratum for NI.

Within each stratum, postcode sectors were then stratified according to selected indicators taken from the 2001 Census. Sectors were initially ranked according to the proportion of household with no car, then divided into three bands containing approximately the same number of households, Within each band, sector were re-ranked according to the proportion of households with a household reference person in socio-economic groups 1-5 and 13 and these bands were then sub-divided into three further bands of approximately equal size. Finally, within each of these bands, sectors were re-ranked according to the proportion of people who were pensioners.

Major strata were then divided into minor strata with equal numbers of addresses, the number of minor strata per major strata being proportionate to the size of the major stratum, so larger PSUs have more chance of being selected. Within each of the 228 PSUs, 23 addresses were randomly selected.

***Sample selection scheme***

PSUs were selected with a probability proportional to size sampling scheme.

SSUs were selected with systematic random sampling of 23 addresses within a PSU.

***Sample distribution over time***

Household interviews are spread evenly throughout the calendar year. Typically a small number of interviews will be completed in January of the following year.

***Renewal of sample***

United Kingdom has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Iceland</b>
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***Type of sampling design***

The EU-SILC IS 2009 survey is based on simple random sampling design without stratification.

***Primary and secondary sample unit***

The primary sample units (PSUs) are the individuals.

The sampling unit are person aged 16 years or more living in private households, selected from the Iceland population register.

***Stratification criteria***

Not applicable (The sample is post stratified)

***Sample selection scheme***

The sample is a simple random sample in one step, and no upper age limit.

***Sample distribution over time***

No information is provided.

***Renewal of sample***

Iceland has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Norway</b>
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***Type of sampling design***

The EU-SILC NO 2009 survey is based on systematic one-stage random sampling design.

***Primary and secondary sample unit***

The primary sample units (PSUs) are the individuals aged 16 or more registered in the central population register.

***Stratification criteria***

Not applicable

***Sample selection scheme***

The sample was drawn as a systematic sample from the population register sorted by age.

***Sample distribution over time***

The sample was divided into four periodical groups with different start of the interviewing but similar end of interviewing.

***Renewal of sample***

In the Norwegian design, each selected respondent is part of the sample in eight years. Each year 1/8 of the sample will be replaced. In a period of transition from the old to the new design in the 2003-2007 period, some respondents in the old sample belonged to the sample for eleven years, while some belonged for only six years. Following the new routine for new rotational groups from 2007 on, with supplementation of 16 years olds and immigrants in the existing rotational groups, some selected respondents will belong to the sample in from 7 years to 1 year.

<b>Switzerland</b>
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***Type of sampling design***

The EU-SILC CH 2009 survey is based on stratified random sampling design.

***Primary and secondary sample unit***

The primary sample unit (PSU) are the households.

***Stratification criteria***

Stratification is done by NUTS 2 into 7 strata.

***Sample selection scheme***

Simple random sample is used to draw the PSUs.

*Sample distribution over time*

See National quality report 2009.

*Renewal of sample*

Switzerland has adopted the 4-year rotational integrated design recommended by Eurostat.

<b>Turkey</b>
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The TR 2009 intermediate quality report is not yet available at Eurostat (on 30 June 2011).

### Annex 3: Income components

When there is an asterisk (\*) in the table, there is additional information provided by the country mentioned after the table.

**Table 21:** Household income components: are the standard EU-SILC definitions used?

	HY010	HY020	HY022	HY023	HY030	HY040	HY050	HY060	HY070	HY080	HY090	HY100	HY110	HY120	HY130
	Total hh gross income	Total disposable hh income	Total disposable hh income before social transfers other than old-age and survivors' benefits	Total disposable hh income before all social transfers	Imputed rent <sup>(1)</sup>	Income from rental of property or land	Family/Children related allowances	Social exclusion payments not elsewhere classified	Housing allowances	Regular inter-hh cash transfers received	Interest, dividends, profit from capital investments in incorporated businesses	Interest paid on mortgage	Income received by people aged under 16	Regular taxes on wealth	Regular inter-hh transfers paid
<b>BE</b>	F*	F*	F*	F*	F	F	L*	L*	L*	F	F	F*	F	NC	F
<b>BG</b>	F	F	F	F	F*	F	F	F	F	F	F	F	F	F	F
<b>CZ</b>	F	F	F	F	P	F	F	F	F	F	F	F	F	F	F
<b>DK</b>	F	F	F	F	F	F	F	F	F	F	F	F	F	F	F
<b>DE</b>	F	F	F	F	F	F	F	F	L*	F	L*	NC*	F	F	F
<b>EE</b>	F	F	F	F	F	F	F	F	F	F	F	F	L*	F	F
<b>EL</b>	F*	F*	F*	F*	F	F*	F*	F*	F*	F*	F*	F	F*	F*	F*
<b>ES</b>	F	F*	F*	F*	F	F	F	F	F	F	F	F	F	F	F

	<b>HY010</b>	<b>HY020</b>	<b>HY022</b>	<b>HY023</b>	<b>HY030</b>	<b>HY040</b>	<b>HY050</b>	<b>HY060</b>	<b>HY070</b>	<b>HY080</b>	<b>HY090</b>	<b>HY100</b>	<b>HY110</b>	<b>HY120</b>	<b>HY130</b>
	Total hh gross income	Total disposable hh income	Total disposable hh income before social transfers other than old-age and survivors' benefits	Total disposable hh income before all social transfers	Imputed rent <sup>(1)</sup>	Income from rental of property or land	Family/Children related allowances	Social exclusion payments not elsewhere classified	Housing allowances	Regular inter-hh cash transfers received	Interest, dividends, profit from capital investments in incorporated businesses	Interest paid on mortgage	Income received by people aged under 16	Regular taxes on wealth	Regular inter-hh transfers paid
<b>FR</b>	F	F	F	F	F	F	F	F	F	L*	F	F	F	F	L*
<b>IT</b>	F	F	F	F	F*	F	F	F	F	F	F	F	F	F	F
<b>CY</b>	F	F	F	F	F*	F	F	F	F	F	F	F*	F	F	F
<b>LV</b>	F	F	F*	F*	F	F	F	F	F	F	F	F	F*	F	F
<b>LT</b>	F	F	F	F	F	F	F	F	F	F	F	F	F	F	F
<b>LU</b>	F	F	F	F	F	F	F	F	F	F	F	F	F	F	F
<b>HU</b>	F	F	F	F	F*	F	F	F	F	F	F	F	F	F	F
<b>MT</b>	F	F	F	F	F*	F	F	F	F	F	F	F	F	NC	F
<b>NL</b>	F*	F*	F	F*	F	F	L*	F	F	L*	F	F	F	NC	L*
<b>AT</b>	F*	F*	F*	F*	F	F	F	F	F	F	F	F*	F*	F	F
<b>PL</b>	F	F	F	F	F	F*	F	F	F	F	F	F*	F	F	F*
<b>PT</b>	F	F	F	F	F	F	F	F	F	L*	F*	F*	F	F	L*

	HY010	HY020	HY022	HY023	HY030	HY040	HY050	HY060	HY070	HY080	HY090	HY100	HY110	HY120	
	Total hh gross income	Total disposable hh income	Total disposable hh income before social transfers other than old-age and survivors' benefits	Total disposable hh income before all social transfers	Imputed rent <sup>(1)</sup>	Income from rental of property or land	Family/Children related allowances	Social exclusion payments not elsewhere classified	Housing allowances	Regular inter-hh cash transfers received	Interest, dividends, profit from capital investments in incorporated businesses	Interest paid on mortgage	Income received by people aged under 16	Regular taxes on wealth	Regular inter-hh transfers paid
<b>RO</b>	F*	F*	F*	F*	F*	F*	F*	F*	NC*	F	F*	F	F*	F	F
<b>SI</b>	F	F	F	F	F	F	F	F	F	F	F	F	F	F	F
<b>SK</b>	F*	F	F	F	F	F*	F*	F*	F*	F*	F*	F*	F	F	F*
<b>FI</b>	F	F	F	F	F	F	F	F	F	F	F	F	F	F	F
<b>SE</b>	F	F	F	F	F	F	F	F	F	L*	F	F	F	F	L*
<b>UK</b>	F	F	F	F	F	F	F*	F	F	F	F	F	F	F	F
<b>IS</b>	L*	F*	F*	F*	F	L*	F*	F*	F*	F*	F*	F*	F*	F*	F*
<b>NO</b>	F*	F*	F*	F*	F*	F*	L*	F*	L*	F*	F*	F	F	F*	F*

Source: National Quality Reports 2009

F (fully comparable), L (largely comparable), P (partly comparable), N (not comparable), NC (Not collected).

(1) Imputed rent: According doc 65, the method used should be Regression/Stratification method or User cost method. If the method used is one of these, it is marked as "F". If the method used is different, it is marked as "P". Information gathered through a questionnaire sent by countries on 28/11/2008 and complemented with the information received through the national quality reports 2009.

**Comments from countries:**

**Total household gross income (HY010)**

<b>AT</b>	The Austrian questionnaire includes questions on two income components that are not explicitly specified in the target variables of EU-SILC. These components are incomes received by persons for their compulsory military or civilian service and “other incomes not elsewhere classified”. The latter question was included to avoid under-recording caused by misunderstandings. An additional open question requests the respondents to clarify the source of these “other incomes”, if possible. Then, if plausible, these other incomes not elsewhere classified were included in employee income (PY010), income from self-employment (PY050) or old-age benefit (PY100) on individual level.
<b>BE</b>	$HY010 = PY010 + PY021G + PY050G + PY090G + PY100G + PY110G + PY120G + PY130G + PY140G + HY040G + HY050G + HY060G + HY070G + HY080G + HY090G + HY110G$ <p>PY021G only contains the value of company cars and is comparable to the variable PY020G of previous waves of the survey. PY020G is a new variable from 2008 on which contains in addition to company cars other non-cash income for employees such as luncheon vouchers, goods and services provided free or at reduced price by the employer.</p>
<b>EL</b>	$HY010 = PY010G + PY050G + PY090G + PY100G + PY110G + PY120G + PY130G + PY140G + HY040G + HY050G + HY060G + HY070G + HY080G + HY090G + HY110G$
<b>IS</b>	<p>The sum of all income components:  <math>HY040G + HY050G + HY060G + HY070G + HY080G + HY090G</math>          Plus the sum for all household members of:  <math>PY010G + PY020G + PY050G + PY090G + PY100G + PY110G + PY120G + PY130G + PY140G</math>.</p>
<b>NL</b>	The total household income (gross/disposable) has been computed without taking account the interest paid on mortgage, the imputed rent, the contributions to and benefits from individual private pension plans. Subsequently the payable tax on income and social insurance contributions has been corrected to get the fictitious amounts that should have been paid if these components were not received/paid
<b>NO</b>	<p>The sum of all components: <math>HY040G + HY050G + HY060G + HY070G + HY080G + HY090G</math> + the sum for all household members of: <math>PY010G + PY020G + PY050G + PY090G + PY100G + PY110G + PY120G + PY130G + PY140G</math>.</p> <p>Comments: HY030G (imputed rent) is not calculated as a part of HY010. Hence HY100G (interest paid on mortgages) has not been deducted when constructing HY010.</p>
<b>RO</b>	$HY010 = \Sigma PY010G + \Sigma PY050G + \Sigma PY090G + \Sigma PY100G + \Sigma PY110G + \Sigma PY120G + \Sigma PY130G + \Sigma PY140G + HY050G + HY060G + HY070G + HY080G + HY090G + HY110G$
<b>SK</b>	Definition of income HY010 within EU SILC was adjusted according to common methodology – Document EU SILC 065 (2009 operation). Only one income component of non-cash employee income was in the year 2007 taken into account - PY021G Company car. Variables compulsory from the year 2007 were recorded only on individual level of these income variables and they were not counted into HY010: Non cash employee income (PY020G), Employer’s social insurance contribution (PY030G), Value of goods produced by own consumption (PY070G), Pension from individual private plans (PY080G).

### Total disposable income (HY020)

<b>AT</b>	See HY010
<b>BE</b>	HY120G has not been taken into account, because regular taxes on wealth do not exist in Belgium
<b>EL</b>	$HY020 = HY010 - HY140G - HY130G - HY120G + HY145G$
<b>ES</b>	Negative values are permitted
<b>IS</b>	Defined as total gross income (HY100G+HY130G+HY140G) minus (HY120G+HY130+HY140G)
<b>NL</b>	See HY010
<b>NO</b>	Defined as Total gross income minus (HY130G + HY140G). Note: HY120G (regular taxes on wealth) is included in HY140G and HY100G (interest on mortgage) has not been calculated as a part of HY020
<b>RO</b>	$HY020 = \Sigma PY010G + \Sigma PY050G + \Sigma PY090G + \Sigma PY100G + \Sigma PY110G + \Sigma PY120G + \Sigma PY130G + \Sigma PY140G + HY040G + HY050G + HY060G + HY070G + HY080G + HY090G + HY110G - HY120G - HY130G - HY140G$

### Total disposable income before social transfers other than old-age and survivors' benefits (HY022)

<b>AT</b>	See HY010
<b>BE</b>	HY060G and HY070G rather than HY060N and HY070N have been used
<b>EL</b>	$HY022 = HY020 - PY090G + PY120G + PY130G + PY140G - HY050G - HY060G - HY070G$
<b>ES</b>	Negative values are permitted
<b>IS</b>	Defined as HY020 minus the sum for all household members of: (PY090N+PY120N+PY130N+PY140N) + HY050N+ HY060N+ HY070N
<b>LV</b>	There are no divergences from common standards, but, as we have provided income components of gross and net series, total disposable household income, before social transfers other than old-age and survivor's benefits was calculated from variable HY020 using only net income components (as it was done before 2007) because old age pensions and disability benefits above certain amount is taxable income and thus real total disposable household income before all social transfers would have been wrongly decreased by paid taxes from old age pension and disability benefits.
<b>NO</b>	Defined as HY020 minus the sum for all household members of: (PY090N + PY120N + PY130N + PY140N) + HY050N + HY060N + HY070N.
<b>RO</b>	$HY022 = HY020 - (\Sigma PY090G + \Sigma PY120G + \Sigma PY130G + \Sigma PY140G) - HY050G - HY060G - HY070G$

### Total disposable household income before all social transfers (HY023)

<b>AT</b>	See HY010
<b>BE</b>	PY140G, HY060G and HY070G, gross education related allowances, gross other social transfers and gross houses allowances, respectively, rather than PY140N, HY060N and HY070N have been used.
<b>EL</b>	$HY023 = HY020 - PY090G + PY120G + PY130G + PY140G + PY100G + PY110G - HY050G - HY060G - HY070G.$
<b>ES</b>	Negative values are permitted.
<b>IS</b>	Defined as HY020 minus the sum for all household members of: (PY090N+PY100N+PY110N+PY120N+PY130N+PY140N) + HY050N+HY060N+HY070N
<b>LV</b>	There are no divergences from common standards, but, as we have provided income components of gross and net series, total disposable household income, before social transfers including old age and survivor's benefits was calculated from variable HY020 using only net income components (as it was done before 2007) because old age pensions and disability benefits above certain amount is taxable income and thus real total disposable household income before all social transfers would have been wrongly decreased by paid taxes from old age pension and disability benefits.
<b>NL</b>	Like HY022, but the income components PY100G and PY110G were also excluded.
<b>NO</b>	Defined as HY020 minus the sum for all household members of: (PY090N + PY100N + PY110N + PY120N + PY130N + PY140N) + HY050N + HY060N + HY070N.
<b>RO</b>	$HY023 = HY020 - (\Sigma PY090G + \Sigma PY100G + \Sigma PY110G + \Sigma PY120G + \Sigma PY130G + \Sigma PY140G) - HY050G - HY060G - HY070G$

### Imputed rent (HY030)

<b>BG</b>	<p>Imputed rents are estimated for dwellings used as main residence by the households. The imputation is applied for those households that did not report paying rent:</p> <ul style="list-style-type: none"> <li>- owners-occupiers</li> <li>- rent-free tenants</li> </ul> <p>The market rent is the rent due for the right to use an unfurnished dwelling on the private market, excluding charges for heating, water, electricity, etc. Stratification method based on actual rents (the same used by National Accounts – the same stratification variables and the same market rents). The method is in line with ESA'95 and requirements of Commission Decision 95/309 and Commission Regulation 1722/2005 on the principle of estimating dwelling services.</p> <p>Stratification variables:</p> <ul style="list-style-type: none"> <li>- location (district centre with university, other district centre, smaller town, rural area)</li> <li>- size of the dwelling</li> <li>- number of rooms (1, 2, 3, 4+)</li> <li>- amenities – availability of central heating</li> </ul>
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	Actual market rents – main data sources: - current price statistics - household budget survey - real estate agencies
<b>CY</b>	Calculated using the Heckman Method, but unreliable due to the fact that rental market in Cyprus is quite small.
<b>IT</b>	Estimated by a semi-logarithmic regression (log of the rent, avoiding the re-transformation bias) with self-selection correction à la heckman. In the first stage, we run distinct probit models for owners/renters at a below-the-market price/free tenants versus tenants at a market price. Seniority is included between regressors, but its effect is depurated (parameter from regression equal to 0) in estimating predicted values for sub-populations other than tenants at a market rate.
<b>HU</b>	The calculation of imputed rent is reasoned by international comparison of data within EU
<b>MT</b>	“... estimation of imputed rent values directly from EU-SILC data was not possible. This is due to the fact that the proportion of rented dwellings in Malta is rather low to enable the estimation of rent figures at reliable quality levels. On the basis of 2005 Census data, the National Accounts Unit at the NSO compiled a table of average imputed rent values for dwellings classified by size and type. These values were then attached to the EU-SILC datasets and used as estimates for the imputed rent.”
<b>PL</b>	This variable has been calculated based on the econometric model.
<b>PT</b>	The imputed rent, i.e., the equivalent market rent to be paid for a similar dwelling, was calculated on the basis of a linear regression on HH070, dwelling dimension and degree of urbanization and with actual rents (HH060) as dependent variable.
<b>SE</b>	Imputed rent (HY030) was calculating by using variables HH010, HH020, HH030 and a variable based on regional classifications described, the dwelling costs was imputed from our national household budget survey and our national housing survey.
<b>UK</b>	Imputed rent is not included in the national definition of household income. This variable was provided as part of the 2007 EU-SILC data delivery for the first time.

### Income from rental of property or land (HY040)

<b>EL</b>	Asked as Eurostat recommends, Income from rental of a property or land refers to the income received, during the income reference period, from renting a property (for example renting a dwelling –not included in the profit/loss of unincorporated enterprises- receipts from boarders or lodgers, or rent from land) after deducting costs such as mortgage interest repayments, minor repairs, maintenance, insurance and other charges.
<b>IS</b>	Income from hiring out property not contacted to business activity. Deviates from SILC definitions in that no information is available in the register on interest repayments, maintenance, insurance and other charges.

<b>NO</b>	Defined as net income from rentals (buildings, dwellings, land etc.)
<b>PL</b>	Only in the case of income from rental of a property (HY040) the respondents were asked to give the gross income and the amount of tax paid.
<b>RO</b>	rent received for renting land, buildings, dwellings or rooms
<b>SK</b>	Similarly as in EU SILC 200 also in the survey EU-SILC 2008 we used adjusted direct question related to variable HY040G using possibility to give only gross annual amount. In the case if respondent did not know exactly to give the sum obtained as income from rental of poverty or land, there was a possibility to estimate it through income interval. *From values obtained through income intervals, the result variable was calculated as average value within used interval.

### Family/children related allowances (HY050)

<b>BE</b>	Family / children related allowance includes: - Income maintenance benefit in the event of childbirth - Birth grant - Parental leave benefit - Family or child allowance. For the SILC 2008 Belgium asked allowances received from the federal government and also birth grants given by some local authorities and medical organizations.
<b>EL</b>	Family / children related allowance includes: <ul style="list-style-type: none"> <li>• Lifelong pension for mothers having more than 3 children</li> <li>• Allowance for families having 3 children</li> <li>• Allowance for families having more than 3 children</li> <li>• Lump sum due to birth of third, four etc. child</li> <li>• Family allowances for public servants</li> <li>• Incapacitated relatives care benefit</li> <li>• Pregnancy-puerperal benefit</li> <li>• Parental leave allowance</li> <li>• Birth grant</li> <li>• Marriage benefit (lump-sum)</li> </ul> <p>The allowance for family public servants, the allowance for pregnancy-puerperal and the allowance for parental leave, if registered to the particular question, will not be included to the income of employees.</p>
<b>IS</b>	Includes the following income components: <ul style="list-style-type: none"> <li>- Family allowance</li> <li>- Maternity allowance (birth grant)</li> <li>- Single parent's allowance</li> </ul>
<b>NL</b>	Maternity and parental leave benefits are not included in HY050 as those benefits cannot be separated from wages. These components are included in variable PY010
<b>NO</b>	Includes the following components: <ul style="list-style-type: none"> <li>- child allowance</li> <li>- maternity benefits (daily cash benefit for working mothers and lump sum benefit for nonworking mothers)</li> <li>- cash-for-care benefit</li> <li>- child support for single parents (education and childcare)</li> <li>- transitional benefit to single parents</li> </ul> <p>Deviation from the SILC concept:</p>

	The current register data covers only roughly 50% of the total amount paid out in daily cash maternity benefit. The remaining amount is included in PY010 (Gross employee cash or near cash income).
<b>RO</b>	Child allowance; - Complementary family allowance; - Allowance for new-born children; - Allowance for single-parent families; - Allowance paid to families which rise children in family placement; - Monthly social benefit for wives of people in compulsory military service; - Benefit for the maternal leave or for leave due to child care; - Benefit for leave due to child care
<b>SK</b>	The variable Family/children-related allowances is considered as an income at the household level. In connection with the national legislation, where one member of the household sharing of expenditures can receive more allowances in connection with care of child, the variable was collected on personal level. The total household income from component family allowances has represented the sum of family allowances provided to all entitled persons in household in the income reference period. Within the variable HY050G, these components were followed: *- child allowance, parental allowance, maternity allowance, lump-sum and regular foster care benefits, equalising contribution, other cash benefits (contribution to the parents of triplets (or more children born simultaneously) or to the parents of sets of twins born within a two year period), child-birth contribution. Since the year 2007 we have collected bonus to child birth contribution in this variable, which serves the purpose of ensuring necessary needs of child, who was born to mother as the first child and stayed alive at least 28 days since the day was born.
<b>UK</b>	The national definition of income includes the cash value of free school meals provided to children from disadvantaged homes. This is not included in the EU-SILC definition of income.

### Social exclusion payments not elsewhere classified (HY060)

<b>BE</b>	Social benefits in the function 'social exclusion not elsewhere classified' includes for Belgium: - Income support: periodic payments to people with insufficient resources. - Other cash benefit: support for destitute and vulnerable persons to help alleviate poverty or assist in difficult situations. Belgium only took into account the Benefits paid by the Public Social Welfare Organization (not the benefits paid by private or non profit organizations).
<b>EL</b>	Social benefits in the function 'social exclusion not elsewhere classified include: <ul style="list-style-type: none"> <li>• Assistance – lump sum – to poor households in mountainous and disadvantageous areas</li> <li>• Allowances to children under 16 years old who live in poor households (preschool and school allowance)</li> <li>• Allowance to repatriates</li> <li>• Allowance to refugees</li> <li>• Allowance to persons released from prison</li> <li>• Allowance to drug-addicts and alcoholics</li> </ul>

	<ul style="list-style-type: none"> <li>• Allowances to long-standing unemployed aged 45-65</li> <li>• Allowance of social solidarity for pensioners</li> <li>• Assistance to households having faced earthquake, flood, etc.</li> </ul>
<b>IS</b>	Includes the total amount received in social assistance.
<b>NO</b>	Includes the total amount received in social assistance (benefits and loans).
<b>RO</b>	- Benefit for persons without incomes/ with low incomes; - Benefit for dwelling heating; - Emergency benefit for urgent situations (natural disasters etc.)"
<b>SK</b>	"Within the variable, there were collected and calculated these components: *material need assistance (...) *scholarship for students (...) *other cash benefits (...).According to national legal enactment material need assistance includes benefit for material need assistance, which is paid in form of joint sum together with individual allowances to mentioned benefit – activation benefit, housing allowance, health-care allowance and protection benefit.(...)For EU SILC 2009 in variable HY060G there were collected only those scholarships for elementary a secondary school students, which were provided in order to reduction of social situation of households situated in material need."

### Housing allowances (HY070)

<b>BE</b>	The housing allowances for Belgium includes: - Rent benefit - Benefit to owner–occupiers: a means-tested transfer by a public authority to owner-occupiers to alleviate their current housing costs: in practice help with paying mortgages and/ or interest. It excludes: - Social housing policy organized through the fiscal system - All capital transfers (in particular investment grants), for example rehabilitation subsidy and/or a building subsidy.
<b>DE</b>	The variable does not include the housing allowances of households receiving HARTZ VI.
<b>EL</b>	The housing allowances include: <ul style="list-style-type: none"> <li>• Benefits paid to bank clerks or public servants working in border areas, or to military servants</li> <li>• Rent benefit, a means-tested transfer by a public authority to tenants, based on income</li> <li>• Rent benefit, transfer by a public authority to households having faced an earthquake, flood, etc, independently of income</li> <li>• Benefit to owner–occupiers: a means-tested transfer by a public authority to owner occupiers to alleviate their current housing costs: in practice help with paying mortgages and/ or interest and/or rehabilitation subsidy and/or a building subsidy.</li> <li>• Subsidy of interest rate for loans of first dwelling.</li> </ul> It excludes: <ul style="list-style-type: none"> <li>• Social housing policy organized through the fiscal system</li> <li>• All capital transfers (in particular investment grants).</li> </ul>
<b>IS</b>	Includes rent benefits granted to tenants.

<b>NO</b>	Includes dwelling support in cash received by renters and owner-occupiers. Deviation from the SILC concept: The benefit from renting a subsidized dwelling is not included in the income concept.
<b>RO</b>	We didn't identify any allowance or benefit to be included in this category.
<b>SK</b>	Housing allowance – exists only as social benefit on national level, which can be observed only as part of material need assistance (variable HY060G). Within this variable was collected non-refundable contribution from the State Housing Development Fund. Non-refundable contribution is provided to applicant, if he/she ensures dwelling for disability person in order to compensation of higher costs in comparison with barrier building. "

### Regular inter-household cash transfers received (HY080)

<b>EL</b>	Regular inter-household cash transfers received refer to regular monetary amounts received, during the income reference period, from other households or persons. More specifically, we asked for “alimony –compulsory or voluntary”, “child support, for children residing away from home” and in general for any regular cash support.
<b>FR</b>	These transfers exclude the exceptional remissions but include the payment of the rent by a third person.
<b>IS</b>	Includes alimonies received. Information on regular private cash support received by children from parents living in a separate household is included from interview. The same goes for other inter household cash transfers received
<b>NL</b>	Alimonies received from former spouse are available in the Tax Administration. Other transfers like payments received from parents living in a separate household (e.g. students) and child alimony are collected in the EU-SILC- interview.”
<b>NO</b>	Includes alimonies and paid maintenance from former spouse (or advance payment from the government). Information on regular private cash support received by children living in separate households (e.g. students) is collected from the interview.
<b>PT</b>	It was collected according to document EU-SILC 065(2009 operation), but also including monetary transfers from family members away from home for a long time (according to the Portuguese definition of household member, not similar to EU-SILC).
<b>SE</b>	Regular inter-household cash transfers paid/received do only consider transactions between parents not living together. Other types of alimonies or cash transfers are not included.
<b>SK</b>	Within variable there were collected cash transfers with periodicity of payment, which is in accordance with definition of variable HY080G within Doc. 065 (2009 operation): *regular transfers, i.e. transfers receipts are anticipated or relied on, *current, i.e. available for consumption during the income reference period. Regular cash inter-household transfers received were collected in detailed structure as: *compulsory alimony and child support (including subsidiary

	alimony), *voluntary alimony and child support, *regular cash support from persons other than household members (e.g. cash support from the side of grand parents), *regular cash support from households abroad (e.g. from relatives living abroad). **Data for individual income components mentioned above were counted to create final variable HY080G.**HY081G – Alimonies received (compulsory + voluntary). In this variable there were included compulsory and voluntary alimonies and definitions were in accordance with Doc.065 (EU SILC 2009 operation). These income components were included: compulsory alimony and child support (including subsidiary alimony), voluntary alimony and child support.
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### Interest dividends, profit from capital investments in incorporated business (HY090)

<b>DE</b>	In the question for capital income due to necessary simplification for the respondent and unlike the standard EU-SILC definition there was no restriction made to business in which the person does not work. This difference is of minor relevance since in 2004 only about 2% of the employees in the German sample received profit-sharing payments or stocks by the employer.
<b>EL</b>	Interests, dividends, profits from capital investment in an unincorporated business refer to the amount of interest from assets such as bank accounts, certificates of deposit, bonds, etc, dividends and profits from capital investment in an unincorporated business, in which the person does not work, received during the income reference period less expenses incurred.
<b>IS</b>	Interest and dividends are taxable income.
<b>NO</b>	Interest and dividends are taxable income. In addition some other minor income items are included, e.g. profit from life insurance and certain types of income from abroad (lottery winnings etc.).
<b>PT</b>	It was collected according to document EU-SILC 065 (2009 operation). However, the collecting team has been trained to control misunderstanding problems, it is possible that some people working in their own “family” company may not have declare their profits as so, but as self-employed work income.
<b>RO</b>	" interests; - dividends; - profit from capital investments in unincorporated business"
<b>SK</b>	"Within variable HY090G there were collected separately income components, which are not taxed (dividends, share of profits of sleeping partner) and those ones, which are liable to tax on income (interest, profits from capital investments). In the case of the situation if respondent did not know exactly to give the sum received from interest, dividends and profits from capital investments, the value could have been estimated using proposed income intervals, which could have lead to decrease of numbers of imputations. Income intervals range was not adjusted and remained the same as was used in EU SILC 2007. In the case of values received through income intervals the result variable was calculated as average value within used interval".

### Interest paid on mortgage (HY100)

<b>AT</b>	'The components imputed rent (HY030), interest payments on mortgages (HY100) are not included in the tables because these variables are not directly collected from the respondents.'
<b>BE</b>	Interest paid on mortgage refers to the total gross amount, before deducting any tax credit or tax allowance, of mortgage interest on the main residence of the household during income reference period.
<b>BG</b>	Interest repayment on mortgage (HY100G)
<b>CY</b>	Interest paid on mortgages is collected asking directly the amount. Over and above, a double check is carried out with an estimation of the amount, which is calculated on the basis of the following questions: year the housing loan was taken, the initial amount borrowed, years of repayment of the initial loan, the monthly payment, the outstanding amount at the end of the previous year, the actual total amount paid on the previous year and the interest rate applied for the loan.
<b>DE</b>	The variable will be filled in first time in wave 2010. The collection form will be based on the questionnaire of the Household Budget Survey (EVS) 2008. The EVS questionnaire contains several detailed questions on this issue. Empirical results from former EU SILC waves show that the variable cannot be collected within the scope of one question.
<b>IS</b>	As interest repayments on mortgage are used for calculating fiscal benefits to owner-occupiers are to be found in registers
<b>PL</b>	It has been recorded at component level only and they are not included in the household's total income'
<b>PT</b>	It was collected according to doc. EU-SILC 065 (2009 operation). When the value of the interest paid on mortgage was not available but we knew the value of mortgage, it was necessary to calculate the interest paid with the use of the value of the annuity
<b>SK</b>	For EU SILC 2009 variable is not taken into account in variable HY010.
<b>UK</b>	Interest repayments on mortgages are not included as deductions within either the national or EU-SILC definitions of income, because neither includes imputed rent.

### Income received by people aged under 16 (HY110)

<b>AT</b>	"Incomes received by people aged under 16" are recorded in variable HY110N/G on household level and it is not differentiated between income from employment and other means of income.
<b>EL</b>	Income received by people aged under 16 is defined as the gross income received by all household members aged under sixteen during the income reference period. Income received from other household members for work in the family business is not included.
<b>EE</b>	Survivors' benefits received by people aged 15 or less are recorded under variable PY110.

<b>IS</b>	Includes the following income components: - Interests and dividends. Those are registered in one sum on parent's tax return. If more than one child is in the household it is divided equally between the children. - Children with income.
<b>LV</b>	There are no divergences from common standards. Basically there are included wages and salaries received during holidays or out of school time.
<b>RO</b>	- income received by people aged under 16 (collected in the household questionnaire); - personal gross/net income of people 15 years old (collected in the personal questionnaire)

### Regular taxes on wealth (HY120)

<b>EL</b>	Regular taxes on wealth refers to taxes that are paid periodically on the ownership or use of land or buildings by owners. The regular taxes on wealth provided will be those paid during the income reference period.
<b>IS</b>	As the taxes are paid in the following year information is sought in registers from the year before.
<b>NO</b>	Included in HY140: Total tax on income.

### Regular inter-household transfers paid (HY130)

<b>EL</b>	Regular inter-household cash transfers paid refer to regular monetary amounts paid, during the income reference period to other households or persons. More specifically, we asked for "alimony –compulsory or voluntary", "child support, for children residing away from home" and in general for any regular cash support.
<b>FR</b>	These transfers exclude the exceptional remissions but include the payment of the rent by a third person.
<b>IS</b>	Information on alimonies paid and regular private cash support to children from parents living in a separate household is included from interview. The same goes for other inter household cash transfers received.
<b>NL</b>	Maintenance allowances to former spouse were collected from the Tax Administration. Other transfers like child alimony are collected in the EU-SILC interview.
<b>NO</b>	Includes paid maintenance to children and former spouse (alimony). These payments appear as deductions in the tax return. Information on regular cash support provided by parents to children living in separate households (e.g. students) is included from the interview.
<b>PL</b>	Since EU-SILC 2008 two additional variables were distinguished from both variables on regular cash transfers (HY080 and HY130): Alimonies received - compulsory + voluntary (HY081), and Alimonies paid – compulsory + voluntary (HY131). HY081 variable is contained in the variable HY080 and similarly, HY131 is contained in HY130.

<b>PT</b>	It was collected according to document EU-SILC 065 (2009 operation), but also including monetary transfers given to family members away from home for a long time (according to the Portuguese definition of household member, not similar to EU-SILC).
<b>SE</b>	Regular inter-household cash transfers paid/received do only consider transactions between parents not living together. Other types of alimonies or cash transfers are not included.
<b>SK</b>	Within variable there were collected cash transfers with periodicity of payment, which is in accordance with definition of variable HY080G within Doc. 065 (2008 operation): regular, i.e. transfers payments, which are anticipated or relied on, current, i.e. out of the income from the income reference period. Within EU SILC 2008 there were regular cash inter-households transfers paid collected in detailed structures as: compulsory alimony and child support, voluntary alimony and child support, regular cash support to persons other than household members (e.g. cash support from the side of grand parents, children and etc.), regular cash support to households abroad (e.g. to relatives living abroad). Data for individual income components mentioned above was calculated for the purpose of Eurostat in order to create output variable HY130G. HY131G – Alimonies paid (compulsory + voluntary). In this variable there were included compulsory and voluntary alimonies and definitions were in accordance with Doc.065 (2008 operation). These income components were included: compulsory alimony and child support, voluntary alimony and child support.

**Table 22:** Individual income components: are the standard EU-SILC definitions used?

	<b>PY010</b>	<b>PY020</b>	<b>PY021</b>	<b>PY030</b>	<b>PY050</b>	<b>PY070</b>	<b>PY090</b>	<b>PY100</b>	<b>PY110</b>	<b>PY120</b>	<b>PY130</b>	<b>PY140</b>	<b>PY200</b>
	Cash or near-cash employee income	Other non-cash employee income <sup>(1)</sup>	Income from private use of company car	Employers' social insurance contributions	Cash profits or losses from self-employment	Value of goods produced for own consumption	Unemployment benefits	Old-age benefits	Survivors' benefits	Sickness benefits	Disability benefits	Education-related allowances	Gross monthly earnings for employees <sup>(2)</sup>
<b>BE</b>	F	F	F	F*	F	NC*	F	F	F	F	F	L*	NC
<b>BG</b>	F	F	F*	F	F	F	F	F	F	F	F	F	F
<b>CZ</b>	F	F	F	F	F	P*	F	F	F	F	F	F	NC
<b>DK</b>	F	F	F	F	F	F	F	F	F	F	F	F	NC
<b>DE</b>	F	F	F	NC	L*	L*	L*	F	F	F	F	F	NC
<b>EE</b>	F	F	F	F	F*	F	F	F	L*	F	F	F	NC
<b>IE</b>	:	:	:	:	:	:	:	:	:	:	:	:	:
<b>EL</b>	F*	F*	F	F*	F*	F*	F*	F*	F*	F*	F*	F*	F
<b>ES</b>	F	F	F	F*	F	F	F	F	F	F	F	F	F
<b>FR</b>	L*	L	NC*	L*	F	F	F	F	F	F	F	F	NC
<b>IT</b>	F	F	F*	F*	L*	F*	F	F	F	F*	F	F	F
<b>CY</b>	F	F	F	F*	F	F*	F	F	F	F	F	F	NC*
<b>LV</b>	F	F	F*	F	F*	F*	F	F	F	F	F	F	NC*

<b>LT</b>	F*	F*	F	F	F*	F*	F	F	F	F*	F	F	NC
<b>LU</b>	F	F	F	F	F	F	F	F	F	F	F	F	NC
<b>HU</b>	F	F	F	F	F	F	F	F	F	F	F	F	F
<b>MT</b>	F	F	F	F*	F	NC	F	F	F	F	F	F	NC
<b>NL</b>	L*	F	F	F	F	NC	L*	F	F	F	F	F	NC
<b>AT</b>	F*	F*	F*	F	F*	F	F*	F*	F	F	F	F	F
<b>PL</b>	L*	F*	F*	F*	L*	F*	F	F	F*	L*	F	F	F
<b>PT</b>	F*	F*	NC	F*	F	F	F	F*	F*	F	F	F	F
<b>RO</b>	F*	F*	F*	F	F*	F*	F*	F*	F*	F*	F*	F*	NC
<b>SI</b>	F	F*	F	F	F*	F*	F	F	F*	F	F*	F	NC
<b>SK</b>	F*	F*	F*	F	F*	F*	F*	F	F	F	F	F*	L*
<b>FI</b>	F	F*	F	L*	F		F	F	F	F	F	F	NC
<b>SE</b>	F	F*	F	F	F		F	F	F	F	F	F	NC
<b>UK</b>	F	F	F	F	F	F*	F	F*	F	F	F	F*	F
<b>IS</b>	L*	F	F	F	L*	NC	L*	F*	F*	L*	F*	L*	F
<b>NO</b>	L*	F*	F*	NC	L*	NC*	L*	L*	L*	L*	L*	F*	NC

Source: National Quality Reports 2009

F (fully comparable), L (largely comparable), P (partly comparable), N (not comparable), NC (Not collected).

(1) Other non-cash employee income: If fulfils: 5 from 5 mandatory components -> "F"; 4 from 5 -> "L"; 3 from 5 -> "P"; 2 from 5 -> "N".

(2) Variable mandatory only for countries that compute the gender pay gap using EU-SILC data.

\*: comments received by countries (see hereafter)

## Comments from countries

### Cash or near-cash employee income (PY010)

<b>AT</b>	This variable includes payments in kind for the private use of company cars, income from compulsory military services, other income not elsewhere classified if plausible and proportional lump-sum payments if the person is employed for more than 1 month. This complies with the EUROSTAT definition.
<b>EL</b>	<p>Employee cash or near cash income refers to the monetary component of the compensation of employees in cash payable by an employer on behalf of the employee to social insurance schemes or tax authorities. Included are:</p> <ul style="list-style-type: none"><li>• Wages and salaries paid in cash for time worked or work done in main and any secondary or casual job(s)</li><li>• Overtime</li><li>• Commission and tips</li><li>• Piece rate payments</li><li>• Payments for fostering</li><li>• Profit sharing and bonuses</li><li>• Allowance for working in remote locations, for transport</li><li>• Remuneration for time not worked (e.g. holiday payments)</li><li>• Additional payments based on productivity</li><li>• Supplementary payments (e.g. thirteenth month payment)</li><li>• Marriage allowance</li><li>• Allowance to the workers in the building constructions</li></ul> <p>Excluded are:</p> <ul style="list-style-type: none"><li>• Reimbursements made by the employer for work-related expenses (e.g. business travel)</li><li>• Severance and termination pay to compensate employees for employment ending before the employee has reached the normal retirement age for that job and redundancy payments</li><li>• Allowances for purely work-related expenses such as those for travel and subsistence or for protective clothes</li><li>• Lump sum payments at the normal retirement date</li><li>• Union strike pay</li></ul>
<b>FR</b>	Wages are net of employees' social contributions. Since 2008, wages being recovered by matching, they include benefits in kind declared with respect to taxes and taxable early retirement benefits (they can not be distinguished from wages).
<b>IS</b>	<p>Deviation from the SILC concept:</p> <p>It is not possible to separate from employee cash income redundancy compensations that should be included under unemployment benefits. The same goes for wages and salaries during sickness, which is a major part of sickness benefits paid in Iceland.</p>
<b>LT</b>	To calculate Sickness benefits (PY120) data from the State Social Insurance Fund Board and the State Tax Inspectorate were used. The algorithm based on country health insurance system was used for missing values.
<b>NL</b>	Allowances for transport to or from work are not included in PY010. Severance and termination payments to compensate employees and redundancy payments (including lump-sum payments) are also included in PY010G. They are not included in PY090G (unemployment benefits).
<b>NO</b>	<p>Defined as the sum of all wages and salaries including overtime, holiday pay, tips and bonuses.</p> <p>Deviations from the SILC concept:</p> <ul style="list-style-type: none"><li>- payments to foster parents (included in wages, cannot be separated from wages)</li></ul>

	<p>- severance and termination pay</p> <p>- sickness benefits that are not directly paid out to the employee (i.e. compensation from the Social Security Scheme to the employer)</p> <p>With the exception of sickness benefits these deviations are expected to be of a minor importance.</p>
<b>PL</b>	<p>This variable does not account for:</p> <ul style="list-style-type: none"> <li>- assistance for foster families; since granting the benefit is not connected with quitting the job, this benefit has been qualified to the category of „Family related allowances (HY050),</li> <li>- benefit granted to the families when the only person providing income for the family is called up to the active military service; as this benefit is only granted when the only family supporter has been called to the military service, it has been included in the category of „Family related allowances (HY050).</li> </ul>
<b>PT</b>	<p>It was collected according to doc. EU-SILC 065 (2009 operation). The questionnaire had a reminding question listing all the extra possible income items besides the monthly regular income.</p>
<b>RO</b>	<p>Salaries and other employees rights</p>
<b>SK</b>	<p>Variable was defined in accordance with Document EU SILC 065 (2009 operation). Since EU SILC 2008 there were also included in this variable cash housing allowances paid by employer, i.e. cash form provided by employer in order to compensate housing cost. Accommodation provided free or at reduced rent by employer to the employees as the main residence, i.e. housing provided like noncash employee income by employer, was not included here, but in variable PY020G. Under national legal enactment – Labour Code – there is payment as severance pay and retirement benefits paid by employer as part of gross wage. In EU SILC 2009, both variables were collected within group of questions related to variable PY010G (Cash or near-cash employee income). In order to ensure data comparability with other Member States and in accordance with Document EU SILC 065 (2009 operation), these income items were added to as following: - severance pay to variable PY090G (Unemployment benefits), - retirement benefits to variable PY100G (Old-age benefits).</p>

### Other non-cash employee income (PY020)

<b>AT</b>	<p>According to EU-SILC Doc 65 (2009 operation) non-cash employee income includes the following sub-components: Free or subsidised meals, free or subsidised housing, housing related expenses, other goods and services. PY020 is not included in the household incomes.</p>
<b>EL</b>	<p>Gross non-cash employee income includes:</p> <p>Information on the following items has also been collected and included, for:</p> <ul style="list-style-type: none"> <li>• company car and associated costs</li> <li>• Free of charge or contribution meals within working hours</li> <li>• Reduced values for electricity, telephone, water etc</li> <li>• Produced goods provided free of charge or with reduced price to employees</li> </ul>
<b>LT</b>	<p>All components of this variable were collected. The values related to company car were recorded under variable PY021 and were added to the calculation variables HY010, HY020, HY022 and HY023.</p>
<b>NO</b>	<p>In previous years this has only included the estimated value of using a company car. From 2008 on (the income year 2007) it includes the following elements:</p> <ul style="list-style-type: none"> <li>- Company car</li> <li>- Electronic communication paid by employer (telephone, internet connection etc)</li> <li>- Insurance against accidents and other insurances</li> <li>- Advantage of subsidised loans</li> </ul>

	- Advantage of subsidised stocks in the company - Other taxable payments in kind such as electricity, accommodation, holidays/travels, transport, etc.
<b>PL</b>	Included for the first time in 2007
<b>PT</b>	It was collected according to doc. EU-SILC 065 (2009 operation). Company car was not collected.
<b>RO</b>	- In-kind employee salaries; - Non-cash employee income. For these incomes we collected: net amount, if the income tax was retained at source, deduction and other amounts retained at source.
<b>SE</b>	Non-cash employee income includes more than company car (housing cost/ interest on loans below market price etc).
<b>SI</b>	Tax declaration Income reference period: year 2008
<b>SK</b>	For EU SILC 2009 there were collected these non-cash income components: luncheon vouchers including contribution to meals consumed at canteen, reimbursement of gas, electricity, water, reimbursement or payments for telephone or mobile phone bills other non-cash benefits (e.g. benefit for sport, language courses, discount for company goods or services, providing vouchers for purchase of goods and others), accommodation provided free or at reduced rent by the employer as the main residence and into output variable PY020G they are taken into account together with income from company car.

#### Income from private use of company car (PY021)

<b>AT</b>	This variable includes payments in kind for the private use of company cars, income from compulsory military services, other income not elsewhere classified if plausible and proportional lump-sum payments if the person is employed for more than 1 month. This complies with the EUROSTAT definition.
<b>BG</b>	Since 2007 the revenue from the use of a company car for private purposes (PY021) was added as a component of the aggregate income.
<b>FR</b>	It is not possible to isolate the part from the company car from the salaries in kind. Variable PY021 is therefore not computed.
<b>IT</b>	The value of the company car for personal use is the user's cost estimated by the ACI (Automobile Club Italiano).
<b>LV</b>	A special method was used to evaluate the non-cash employee income from the use of a company car for personal purposes. According to the Latvian situation the method based on a system analysis model was chosen for calculating the employee non-cash income from the use of a company car for personal purposes. Components for calculating the monetary value of this, a non-cash employee income, was included in the questionnaire and collected directly from respondents: the class of the car, the year of its production, the total amount of kilometres driven by the company car in the previous calendar year (2008), the annual amount of kilometres driven by the vehicle for private use, the occupation of the company car user, coverage of the car related costs made by the employer: fuel, technical inspection of the car, the purchase of tires (i.e., did the employer pay bills for the purchase of fuel, technical inspection of the car, the purchase of tyres), restrictions of the use of the company car (i.e. if employer created restrictions to the employee for the use of the company care for personal purposes). It was assumed that the employer covered all costs related to the use of the company car for the employee's personal use.
<b>NO</b>	Previously included in PY020
<b>PL</b>	The information on the private use of the company car is collected in the individual questionnaire. The respondent gives the estimated amount he/she has gained by using the

	company car for private purposes. In case of the missing value (the respondent was using the company car but did not estimate the amount gained), imputation is applied with the use of hot-deck and regression imputation with simulated residuals methods
<b>RO</b>	The following information were collected in the individual questionnaire: - the type of the car; - the model; - the registration year; - number of months in 2008 the car was at the disposal of the person for private use. The company car value was calculated as: Company car value = number of months*selling price*[1 – 100*(2009 - registration year)/10]/12. The selling prices of the cars by type of car and producer were taken from the List of manufactures recommended retail prices of the Competition DG report.
<b>SK</b>	In order to ensure comparability of variable „ benefit from company car“, there was used variable PY021G in 2009. *Benefit from using company car for personal purposes was estimated on the basis of depreciated price of company car for actual year and other cash benefits, which were provided by employer in connection with car for personal purposes – benefit paid for petrol, benefit related to compulsory car insurance and repair and maintenance benefits. As input components for estimation of depreciated price of car for the actual year was market price of new car, period of amortisation established by law (4 years) and age of car (on the basis of year of production). Market price of car for the year 2009 was updated according to available external sources of price of new car is depreciated from price of new car every year. Theoretically depreciated price of 5-year car would equal 0. Practically older cars are used too and their actual depreciated price does not equal 0. Depreciated price of cars older than 4 years was calculated in such a way that of price of new car was divided by age of car overlapping 3 years (because for the period of 4 years, there is assigned of the price). Total benefit from using company car represents the sum of estimated depreciated price of company car, benefit paid for petrol, benefit related to compulsory car insurance and repair and maintenance benefits.

### Employers' social insurance contributions (PY030)

<b>BE</b>	The outcome of variable PY030 was the result of the following model: For blue collar workers: $((PY010G * 1,08) / 100) * 50,5$ And for white collar workers: $PY010G / 3$ Both equations were derived from social security rules.
<b>CY</b>	Employers' social insurance contributions were collected according to the guidelines provided by Eurostat.
<b>FR</b>	They include social contributions paid into the general scheme, but also certain taxes levied on wages (transport payment, National Fund for housing assistance, tax learning, vocational training).
<b>EL</b>	Employers' contributions are defined as payments made, during the income reference period, by employers for the benefits of their employees to insurers.
<b>ES</b>	Provided for this survey. Only the compulsory social contributions are included. The voluntary social contributions are excluded. According to the Labour Cost Survey (2008) the employers contributions to private plans are a 3% of the compulsory contributions.
<b>IT</b>	Includes also contribution for Cococo "coordinated and continuative collaborators", a special category of status in employment.
<b>MT</b>	For MT the employers' social insurance contribution is exactly equal to the social contribution paid by the employee plus subsidies paid by the employer on private health insurance, house insurance and life insurance.
<b>PL</b>	Included for the first time in 2007. It has been recorded at component level only and it is not included in the household's total income.

<b>PT</b>	It was calculated according to doc. EU-SILC 065 (2009 operation) and considering the official social insurance contribution tax and conditions.
<b>SI</b>	Tax declaration Income reference period: year 2008
<b>FI</b>	Optional contributions made by employers on the basis of contractual or specific sector arrangements have not been included in PY030G. The information is not available from registers and thus is not measurable as reliably as other income. The total amount of optional contributions of all employer's social insurance contributions is about 10 percent according to NA. A very small part of optional contributions has however been counted in PY020G: e.g. such contributions to individual pension and risk insurance schemes, which are determined as taxable income by tax authors. These items are part of a register item in PY020G and cant' be separated.

### Cash profits pr losses from self-employment (PY050)

<b>AT</b>	The income component includes also other income not elsewhere classified if plausible (see above (HY010)). The addition of these other income is the result of plausibilisation. Sales revenues from home production (like sold fruits from the own garden) are added to PY050 according to EU-SILC Doc 65 (2009 operation). The questions on privately sold goods were asked on household level to avoid double reporting. The whole amount is attributed to the person with the highest income from self-employment or, in case that there is no self-employed person within the household to the person with the lowest personal income. To gather the information on self-employment incomes the net amount from self-employment and the amounts paid for social security and income tax for self-employment are asked. Based on this information the gross amount is calculated.
<b>DE</b>	Both methods measuring selfemployment income that are recommended by the standard EU-SILC definitions were used in the German questionnaire. Respondents were asked about benefits/losses according to annual accounts and additionally about the yearly amount of money drawn out of their business. Unlike in the standard EU-SILC recommendations the largest amount of the two was taken for calculation of German selfemployment. We think, that given the German tax system, this may in a better way reflect the possibilities of the self-employed to smooth mid-term fluctuations in account benefits contrasting with their more stable potential of wealth. Both amounts were available for all respondents who reported some figures for self-employment income.
<b>EE</b>	In the case of unregistered self-employment, the respondents were asked to estimate the income received this way.
<b>EL</b>	It includes: <ul style="list-style-type: none"> <li>• Net operating profit or loss accruing to working owners of, or partners in, an unincorporated enterprise, less interest on business loans.</li> <li>• Royalties earned on writing, inventions, and so on not included in the profit/loss of unincorporated enterprises.</li> <li>• Rentals from business buildings, vehicles, equipment, etc not included in the profit/loss of unincorporated enterprises, after deduction of related costs such as interest on associated loans, repairs and maintenance and insurance charges.</li> </ul>
<b>IS</b>	Entrepreneurial income is collected net in register data. Royalties are registered as "other income" and not possible to separate and not include here.
<b>IT</b>	The standard procedure requires to collect the amount of money drawn out of self-employment activity only when the profit/loss resulting from accounting books or the taxable self-employment income (net of corresponding taxes) are not available. For the Italian EU-SILC,

	both administrative and survey micro-data are available, through an exact matching of tax and sample records. The income from self-employment is set equal to the maximum value between: (i) the (net) self-employment income resulting from the Tax Report and (ii) the (net) self-employment income reported by the interviewee. In the questionnaire, the self-employment income question is preceded by a 'reminder question' that provides a YES/NO list of the possible personal uses of earnings (consumption and saving). The departure from the standard definition (using both sampling and administrative data) is adopted in order to minimise either tax avoidance in the administrative data or underreporting in the survey data, depending on which of the two is greater. With respect to the standard one, the procedure adopted for the Italian EU-SILC leads to more comparable data, under the assumption that other countries' self-employment incomes are not underestimated.
<b>LT</b>	The self-employment income was collected as the amount of money drawn out of the business for household, personal use. Income from agriculture, included in this variable, was calculated as difference of total revenue from agricultural activity and total expenditure on it.
<b>LV</b>	The net (and gross) income and losses from self-employment were asked to each household member in age of 16 years and over (in income reference period) in Personal Questionnaire. Respondents were asked to tell net amount of self-employment income they had for personal use (incl. making private savings) or losses from self-employment activities during income reference period. There were also the questions about paid taxes to evaluate the gross income.
<b>NO</b>	Entrepreneurial income is collected net in register data. Gross cash losses thus appear as negative amounts. Deviation from the SILC concept: It has not been possible to identify – and thus deduct from self-employment income – interest paid on business loans.
<b>PL</b>	The data on income from self-employment were collected in two different ways: the respondents were asked to declare the company's costs and profits and also the amount of money gained from self-employment which was allocated to the household's expenditure. After a detailed analysis of data it was decided that the income from self-employment would be equal to the amount allocated to the household's needs.
<b>RO</b>	- Cash income received from agricultural associations; - Incomes from sales of agricultural products, animals and poultry; - Incomes from agricultural work carried-out for other households or persons; - Incomes from commerce; - Incomes from services carried-out; - Incomes from trade; - Incomes from liberal professions; - Incomes from royalties; For all these incomes we collected also: anticipated income tax and social; contributions (unemployment, health and pension). The sums are collected in the form of profit or loss.
<b>SI</b>	Tax declaration for personal incomes – profits, wage from enterprise, author contracts Tax declaration for entrepreneurs – profits Questionnaire – incomes from farming Farming subsidies from administrative source – incomes from farming Income reference period: year 2008 From farming we took into account the amount which was higher – from questionnaire or from data file about farming subsidies. Farming subsidies do not include subsidies for investments and subsidies for natural disasters.
<b>SK</b>	Also in EU SILC 2009 two approaches for obtaining information on variable PY050G were used. The first approach data was collected directly from respondents by asking about profit/loss of their self-employment for the period of the last calendar year. If respondents had profit, they could have given this annual amount as gross or net profit. If respondent did not know to give the sum of obtained income exactly (gross profit/loss), for statement of the amount of gross profit/loss he had possibility to made estimation by using income intervals. We used the same interval ranges as were used for EU SILC 2008. In the case of values received through income intervals the output variable was calculated as average value within used interval. Information on variable PY050G (second approach) is also obtained through

	question about amount of lump-sum and regular cash resources from self-employment used for personal purposes. In the case if respondent used for giving his/her profit/loss only one of approaches mentioned above, output variable PY050G was stated on the base of either direct statement of annual sum of profit/loss, used interval or on the base of annual sum of lump-sum and regular cash resources. In the case that respondents used all questions (all approaches) related to expression of information on profit/loss (through direct statement of annual sum of profit/loss, but also giving annual sum of lump-sum and regular cash resources used for private purposes), output variable PY050G was stated on the base of higher annual amount recorded. In data processing some cases of negative income have occurred.
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### Value of goods produced for own consumption (PY070)

<b>BE</b>	This variable is not recorded in the file because the value of goods produced for the own consumption does not constitute a significant component of the income. The importance of the component has been assessed using HBS.
<b>CY</b>	Value of goods produced for own consumption was collected according to the guidelines provided by Eurostat.
<b>CZ</b>	Variable PY070 Value of goods produced by own-consumption, which is defined at the level of individual household members, is collected at the household level and later assigned to the head of household. This is due to the difficult attribution of this income in kind to individual household members (includes mainly small scale farming activities for own-consumption or own-consumption from family businesses).
<b>DE</b>	Value of goods produced for own consumption was, contrary to the preceding year, collected on household level since for many household a differentiation between household members was not possible. If possible the collected value was split according to the persons share on household level in the preceding year. If no data from the preceding year was available the amount was just evenly spread to all household members with personal questionnaire. Since in general it may be assumed that expenses incurred in the production of these goods are of minor relevance compared to their market value and in order to simplify answering, in difference to standard EU-SILC definitions respondents were not asked to deduct such costs.
<b>EL</b>	The value of goods produced for own consumption refers to the value of food and beverages produced and also consumed within the same household. The value of goods produced for own consumption are calculated as the market value of goods produced deducting any expenses incurred in the production, not being though counted in total income. The item has been included in the data files.
<b>LT</b>	Variable was collected and recorded to microdata file, but was not added to the calculation variables HY010, HY020, HY022 and HY023. The quantities of products, used for own consumption, were collected during interview. The value of goods produced for own consumption was estimated by multiplying quantity by market prices of goods from the Household Budget Survey deducting expenses incurred in the production.
<b>LV</b>	The value of goods produced for own consumption was calculated using the information from Household Budget Survey (HBS). Household member responsible for agricultural production was asked to pick the products, which household produced for own consumption during income reference period, from the list (obtained from HBS). This question was asked only to those households, which used the land for certain types of agricultural activity. Depending on the size of household and consumed products, the value of goods produced for own consumption was calculated. Value of goods produced for own consumption was counted to responsible household member.
<b>NO</b>	The tax-assessed benefit from consuming own goods (estimated by the tax authorities) is

	included in gross cash income from self-employment (PY050). The variable PY070 is not included in Norwegian data because the value of own goods for own consumption is assumed to be ignorable. Data from the Norwegian HBS in 2006 shows that consumption of own goods is estimated to be only 0,13 percent of the total consumption in the households. In total, the value of own goods for own consumption is less than 400 NKr (appr 50 euro) on average per household.
<b>PL</b>	have been recorded at component level only and they are not included in the household's total income
<b>RO</b>	The value of own consumption was estimated at the household level (and included in the personal file for only one person per household) from the household budget survey (HBS), using the stratification method. The HBS includes around 37000 households and it is conducted continuously during each year.
<b>SI</b>	Questionnaire – Value of goods (food) and beverages produced and consumed at home. From 2007 (income reference period 2006) the goods are not included into PY070G. The value is collected on the household level, we divided the share of amount to all HH members aged 16+, because it is impossible to know which HH member participated in the work and their share of work in the garden to produce the goods and beverages. Income reference period: year 2008
<b>SK</b>	Within variable there was collected annual amount (value) of goods produced and intended for own consumption of household. Value was calculated on the base of basic market price of these products after deducting direct costs, which were paid in order to their production. Variable was collected on household level, because it is difficult to obtain given information on individual level not excluding elimination of duplicity. As according to EU SILC methodology this variable should be provided on individual level, obtained data was assigned to head of the household.
<b>FI</b>	Value is not significant at the national level, or to particular groups of households. According to the FI-HBS 2006 results, expenditures of goods produced for own consumption (under COICOP K01 Food and non-alcoholic beverages) was 0,3 per cent from all consumption expenditures in the households in average. In employers and own-account workers in agriculture, the percentage was highest, 1,7 per cent, whereas in other socio-economic groups the percentage was as next highest, 0,4 per cent, in pensioners. When counting the expenditures of goods produced for own consumption from household disposable income, the percentages are lower in general (1,3 per cent in employers and own-account workers in agriculture). The information is not included in national IDS (Income Distribution Statistics) or SILC.
<b>UK</b>	This component of income is assumed to be zero in the UK in both the national definition, and in UK EU-SILC.

### Unemployment benefits (PY090)

<b>AT</b>	This component includes proportional lump-sum payments, if the person is unemployed (for at least 2 months).
<b>DE</b>	Unemployment benefits include, depending on the duration of unemployment, up to 7% of the former net employee income as a family allowance for dependent children. As these amounts are not transparent for the respondents, they cannot be split up by them. Therefore all reported amounts were considered as unemployment benefits in difference to the standard EU-SILC definition.
<b>EL</b>	As unemployment benefits included are: <ul style="list-style-type: none"> <li>• Full unemployment allowance</li> </ul>

	<ul style="list-style-type: none"> <li>• Partial unemployment allowance</li> <li>• Early retirement for labour market reasons</li> <li>• Allowance vocational training for unemployed</li> <li>• Reimbursement due to dismissal from work</li> <li>• Seasonal unemployment benefit for persons seasonally working (e.g. actresses, musicians, building workers, hotel staff, etc.)</li> <li>• Allowance for young persons aged 20-29 years</li> <li>• Allowance of military service</li> <li>• Placement, resettlement or rehabilitation benefit</li> <li>• Any other benefit replacing in whole or in part income lost by a worker due to loss of gainful employment.</li> </ul>
<b>NL</b>	PY090 includes the vocational training allowance, i.e. payment by social security funds or public agencies to targeted groups of persons in the labour force who take part in training schemes intended to develop their potential for employment. Statistics Netherlands has no information available on benefit (in-kind) related to vocational training.
<b>IS</b>	Deviation from the SILC concept: It is not possible to separate from employee cash income (PY010) redundancy compensations that should be included here or in PY100.
<b>NO</b>	Includes unemployment benefits for employees and unemployment benefits for the self-employed. Deviation from the SILC concept: No information available on benefits (in-kind) related to vocational training.
<b>RO</b>	- Unemployment benefit; - Professional integration allowance or supporting allowance; - Compensatory payment for collective firing
<b>SK</b>	Variable was defined in accordance with Doc.065 (2009 operation) and was collected in detailed structure

### Old-age benefits (PY100)

<b>AT</b>	Old-age benefits also include other income not elsewhere classified if plausible and proportional lump-sum payments if the person is retired (at least 2 monthly regular payments, up to the total lump-sum payment). Since the standard retirement age in Austria is 65 years for men and 60 years for women, it contains all pension benefits paid to persons aged 65/60 years or older. This complies with the EUROSTAT definition.
<b>EL</b>	Old age benefit includes: <ul style="list-style-type: none"> <li>• Old age pension from public sector</li> <li>• Supplementary pension from public sector</li> <li>• Early retirement pension due to resignation</li> <li>• Care allowance</li> <li>• Parallel pension from private sector (paid by the employer)</li> <li>• Lump sum due to retirement</li> <li>• National resistance pension</li> <li>• Any other old age benefit providing a replacement income when the aged person retires from the labour market, or guarantee a certain income when a person has reached a prescribed age.</li> </ul>
<b>IS</b>	Includes the following income components: <ul style="list-style-type: none"> <li>- Old age pension from social security scheme (basic pension).</li> <li>- Old age pension from compulsory private pension funds (employment pension).</li> </ul>
<b>NO</b>	Include old-age pension from the social security system and occupational pensions.

	Deviation from the SILC concept: It was not possible to split the different types of occupational pensions into different functions, e.g. old-age, disability or survivor's pension. Instead all types of occupational pensions have been included under the old-age function.
<b>PT</b>	It was collected according to document EU-SILC 065 (2009 operation) and as such considering the full set of national benefits. However, it is possible that some old people do not make a clear distinction between old age and survivors' benefits.
<b>RO</b>	- Social insurance pension for old age limit; - Anticipated social insurance pension; - Social benefit (in the form of pension); - Social insurance pension for farmers; - Pension for war invalids, war orphans and war widows (excluding survivors' pension); - Social benefit for war's veterans and war's widows
<b>UK</b>	All benefits included as old-age benefits are also included in the national definition of income. Income from private pensions is included in the EU-SILC definition of income, as in the national definition; however it is not included for the calculation of EU-SILC indicators. In addition, the national definition also includes the value free television licences provided to those over the age of 75.

### Survivors' benefits (PY110)

<b>EE</b>	If more than one household member is eligible for survivors' benefits, the individual benefits are, by default, combined and paid as a single sum to one household member. Due to infeasibility of dividing the survivors' benefit received between household members, the whole benefit is recorded only for the household member to whose account it was transferred. This can marginally affect variable HY110 (income received by those under 16), but has no effect on total household income.
<b>EL</b>	It includes: <ul style="list-style-type: none"> <li>• Old age pension from public sector</li> <li>• Supplementary pension from public sector</li> <li>• Parallel pension from private sector (paid by the employer)</li> <li>• Orphans pension</li> <li>• Pension of war victims</li> </ul>
<b>IS</b>	Includes the following income components: <ul style="list-style-type: none"> <li>- Survivors' pension from social security scheme.</li> <li>- Survivors' pension from compulsory private pension funds.</li> <li>- Death grants.</li> </ul>
<b>NO</b>	Includes survivor's pension from the National Insurance Scheme. In addition several minor income items have been included that are received mainly by survivors, e.g. tax-free wage income and holiday pay earned by the deceased. Deviation from the SILC concept: Not possible to include funeral grants in the income concept. This benefit is transferred directly to the firm of undertakers.
<b>PL</b>	Death grants are not included in the income because the whole sum is used to cover the cost of the funeral.
<b>PT</b>	It was collected according to document EU-SILC 065 (2009 operation) and as such considering the full set of national benefits. However, it is possible that some old people do not make a clear distinction between old age and survivors' benefits.
<b>RO</b>	- Survival social insurance pension; - Allowance or other money rights for survivors of persons dead during 1989; Revolution; - Allowance in case of the death of a family member
<b>SI</b>	By calculation PY110G we consider the legislation in Slovenia and we did not exclude these incomes from PY110G in the case that person is older than it should be for reach old age

	benefits, thus survivor benefits were included in all cases in PY110G, it was not important how old person is.”
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### Sickness benefits (PY120)

<b>EL</b>	Included are: <ul style="list-style-type: none"> <li>• Paid sick leave</li> <li>• Benefit for working accidents</li> <li>• Benefit for spa therapy, airing etc.</li> <li>• Assistance for movement of sick persons</li> </ul>
<b>IS</b>	All sickness benefits that are included in wages and salaries cannot be specified in registers and are included in PY010.
<b>IT</b>	Paid sickness leaves of employees are included in the dependent employment incomes; the same holds true for self-employed.
<b>LT</b>	To calculate Sickness benefits (PY120) data from the State Social Insurance Fund Board and the State Tax Inspectorate were used. The algorithm based on country health insurance system was used for missing values.
<b>NO</b>	Includes sickness benefits paid by the National Insurance Scheme directly to the employee (i.e. after day 16 of sickness). Deviation from the SILC concept: The current register data covers only roughly 50% of the total amount paid out in daily cash sickness benefit. The remaining amount (compensation to the employer) is included in PY010 (Gross employee cash or near cash income).
<b>PL</b>	Sickness and childcare benefits are not included (a childcare benefit is granted to the working parent of a sick child), because they are paid by the employer and cannot be detached from the income from hired employment. Therefore, they are accounted for in the income from hired employment
<b>PT</b>	It was collected according to document EU-SILC 065 (2009 operation) and as such considering the full set of national benefits.

### Disability benefits (PY130)

<b>EL</b>	Included are: <ul style="list-style-type: none"> <li>• Disability pension</li> <li>• Benefit for persons with special needs</li> <li>• Care allowance for incapacitated persons</li> <li>• Care allowance for incapacitated children</li> <li>• Nutrition allowance for people suffering kidney’s disease</li> <li>• Any other cash benefit</li> </ul>
<b>IS</b>	Includes the following income components: <ul style="list-style-type: none"> <li>- Disability benefits and pension from social security scheme (basic pension).</li> <li>- Disability benefits and pension from compulsory private pension funds (employment pension).</li> </ul>
<b>NO</b>	"Include disability pension from the National Insurance Scheme, basic and attendance benefit and rehabilitation benefits. Deviation from the SILC concept: Early retirement benefit is included in occupational pension, i.e. old-age function.
<b>PT</b>	It was collected according to document EU-SILC 065 (2009 operation) and as such considering the full set of national benefits.
<b>RO</b>	- social insurance pension for work incapacity; - Special allowance for handicapped persons

<b>SI</b>	By calculation PY130G we consider the legislation in Slovenia and we did not exclude these incomes from PY130G in the case that person is older than it should be for reach old age benefits, thus disability benefits were included in all cases in PY130G, it was not important how old person is.
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### Education-related allowances (PY140)

<b>BE</b>	It includes allowances referring to grants, scholarships and other education help received by students. However to obtain this variable we asked the information on household level instead of personal level because in Belgium this is paid on household level. Afterwards we attributed this amount to the persons in the individual file.
<b>EL</b>	It includes: <ul style="list-style-type: none"> <li>• Benefit received for participation in research programs</li> <li>• Scholarships</li> </ul>
<b>IS</b>	It includes scholarship of various kinds and “educational alimony” received by children at the age of 18 to 20 years living with single parent (e.g. students).
<b>NO</b>	Include student grants from the State Educational Loan Fund.
<b>RO</b>	- Scholarships; - Cash amount received by people attended high-school included in the program; “Money for high-school
<b>SK</b>	There were included grants, scholarships (e.g. paid from own sources of university) and other support of education received by students. Within variable there are also collected social scholarships for university students, which are paid as merit scholarship or special scholarship. The aim of providing scholarship is help to students situated in unfavourable economical situation, but also as appreciation and support of significant results and activities in education, scientific and art area and representation of university on the field of culture and sport. The amount of social scholarship depends on income falling on household member and is granted to students on the base of excellent educational results or extraordinary results in scientific, art or sport activities. Title to scholarship has not only citizen situated in material need. Scholarships and similar benefits, which are paid in terms of income of persons situated in material need are included into variable HY060G.
<b>UK</b>	"In the national definition of income, student loans are included as income, and student loan repayments are deducted from income. However in EU-SILC, student loans are not treated as income, and loan repayments are not deducted from income."

### Gross monthly earnings for employees (PY200)

<b>CY</b>	Gross monthly earnings for employees were not collected as the gender pay gap is calculated from other sources than EU-SILC.
<b>LV</b>	Value is not recorded as Latvia uses wage statistics for calculating gender pay gap.
<b>SK</b>	The variable was collected, but in terms of the fact that EU SILC 2009 is not a source for calculation of unadjusted gender pay gap, this variable was recorded only on national level.

## Annex 4: Self-employment income

### Received, and recorded gross Mode of collection (PY050G\_F)\*

	Total	1	2	3	4	5
BE	719	.	.	.	719	.
BG	753	.	.	.	753	.
CZ	1562	403	.	.	1159	.
DK	3200	.	.	.	3200	.
DE	1165	.	.	.	1165	.
EE	812	266	.	.	527	19
IE	825	.	.	.	825	.
EL	2753	2753	.	.	.	.
ES	2255	.	.	.	2255	.
FR	978	.	.	978	.	.
IT	6790	6790	.	.	.	.
CY	896	5	.	.	891	.
LV	595	.	.	.	595	.
LT	886	713	.	.	151	22
LU	468	.	.	.	468	.
HU	2167	.	.	.	2167	.
MT	570	.	.	.	570	.
NL	1885	.	.	.	1885	.
AT	1183	.	.	.	1183	.
PL	3420	3420	.	.	.	.
PT	935	.	.	.	935	.
RO	1953	1953	.	.	.	.
SI	3737	.	.	.	3737	.
SK	748	.	748	.	.	.
FI	3733	.	.	.	3733	.
SE	2159	.	.	2159	.	.
UK	1173	.	.	.	1173	.
IS	666	.	.	.	666	.
NO	1065	.	.	.	1065	.
CH	1502	.	.	594	908	.

### Also net recorded

#### Mode of collection and recording of this income (PY050N\_F)\*\*

	Total	11	31	32	33	41	42	43	51
719	719	.	.	.	.	.	.	.	.
753	753	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
737	191	.	.	.	527	.	.	.	19
825	71	.	.	.	754	.	.	.	.
2413	2413	.	.	.	.	.	.	.	.
2255	2255	.	.	.	.	.	.	.	.
978	.	.	.	978	.	.	.	.	.
6790	6790	.	.	.	.	.	.	.	.
5	5	.	.	.	.	.	.	.	.
595	595	.	.	.	.	.	.	.	.
886	713	.	.	.	151	.	.	.	22
456	456	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
1183	1183	.	.	.	.	.	.	.	.
3174	3174	.	.	.	.	.	.	.	.
935	.	117	2	.	553	263	.	.	.
1953	1953	.	.	.	.	.	.	.	.
3737	3737	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
2159	.	2159	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
.	.	.	.	.	.	.	.	.	.
1491	.	.	.	.	594	.	.	897	.

Source: Micro-database (March 2011)

\*PY050G\_F = **1** net of tax on income at source and social contributions, **2** net of tax on income at source, **3** net of tax on social contributions, **4** gross and **5** unknown

\*\*PY050N\_F = **11** collected and recorded at net of tax on income at source and social contributions, **31** collected at net of tax on social contributions but recorded at net of tax on income at source and social contribution, **32** collected at net of tax on social contribution but recorded at net of tax on income at source, **33** collected and recorded at net of tax on social contributions, **41** collected gross but recorded at net of net of tax on income at source and social contributions, **42** collected gross but recorded at net of tax on income at source, **43** collected gross but recorded at net of tax on social contributions and **51** no information about the collection mode but recorded at net of tax on income at source and social contributions.