



Standardised key social variables

Implementing guidelines

May 2020

The present document includes definitions, categories and implementing guidelines of 38 social variables common to the several datasets under Regulation (EU) 2019/1700 of the European Parliament and of the Council of 10 October 2019 establishing a common framework for European statistics relating to persons and households, based on data at individual level collected from samples (IESS).

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34	P3	Field of the highest level of education successfully completed	Common
35	P3	Interviewing mode used	Common
36	P3	Nature of participation in the survey	Common
37	P3	Stratum	Common
38	P3	Primary sampling unit	Common

(1) Sex

Name of the variable

Sex

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter None

Concept The variable refers to the biological and physiological characteristics that define a person to be either male or female.

Category concept

Data should be categorised into 'male' or 'female'.

Categories for the variable

Sex
Male
Female

Implementation guidelines

In case the biological sex of a person is not known, the information should be replaced by either the administrative sex (administrative data) or the self-declared sex (survey data).

For data transmission to Eurostat the categories 'not stated' and 'not applicable' are not allowed for the variable 'sex'. During data collection additional categories deemed necessary at national level might be used but each data record valid for transmission must contain information on the sex of the person to whom it refers. In the absence of this information, information on the variable should be imputed into the data record by attributing the most plausible value.

The quality reporting related to the variable 'sex' should contain information on the number of records where the sex is imputed.

Reference question

Depending on the data collection mode or information being available from administrative sources it might usually not be necessary to ask the respondents directly. In the case when this information needs to be asked directly to the respondents the recommended question is: "What is your sex?"

(2) Age in completed years

Name of the variable

Age in completed years

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter None

Concept The age in completed years is the age at the last birthday before the reference date of the data collection/interview, namely the interval of time between the date of birth and the reference date, expressed in completed years. To deduce the variable 'age in completed years' information on (1) the year of birth, (2) whether the person has already had his or her birthday that year at the reference date ('passing of birthday') and (3) the reference date of the data collection/interview has to be known.

Category concept

The categories of 'age in completed years' are the year of birth, the passing of birthday and the reference date. The integer number of the age in completed years is then deduced from this information.

Categories for the variable

Age in completed years
Year of birth (4 digits)
Passing of birthday (yes/no)
Reference date (DD/MM/YYYY)

Implementation guidelines

Eurostat will deduce the integer 3-digits of age in completed years based on the categories for data transmission described above. When deducing the 3-digits integer the lower limit is included and the upper limit is excluded. For example, a child born on 13 March 2014 will be classified in the category '0 years' at the reference date 12 March 2015 but in the category '1 year' at the reference date 13 March 2015.

The reference date is specific to each social micro-data collection (two reference dates for EU-SILC) as follows:

- For HBS, AES, EHIS, HETUS and ICT HH, the reference date is the time of the first interview (DD/MM/YYYY).
- For EU-LFS, the reference date is the Sunday at the end of the reference week (DD/MM/YYYY).
- For EU-SILC, the two possible reference dates are: the end of the income reference period (DD/MM/YYYY), and the time of interview (DD/MM/YYYY), respectively.

- In the case of countries using an integrated system of household surveys with fixed reference weeks for all the (integrated) household surveys, the reference date is the end of the reference week (DD/MM/YYYY), for all surveys concerned.

The categories 'not stated' or 'not applicable' are not allowed for the variable 'age in completed years'. Each data record valid for transmission must therefore contain information on the year of birth, the passing of birthday and the reference date. In the absence of this information, the information should be imputed into the data record by attributing the most plausible value.

The quality reporting related to the variable 'age in completed years' should contain information on the number of records for which information on the age in completed years is imputed.

Reference question

In the case of asking for the passing of birthday at the time of the interview, the following questions are recommended: "What is your year of birth? Have you already had your birthday this year?" In case the reference date is not the time of the interview, the question has to be adapted, clearly explaining which reference date the passing of birthday should refer to.

At data collection level, the exact date of birth might be asked directly to the respondents. In this case the recommended question is: "What is your date of birth?" (DD/MM/YYYY).

(3) Household grid

Name of the variable

Household grid

Scope

The social micro-data collections EU-SILC, HBS and HETUS

Variable definition

Reporting unit Households

Filter None

Concept The variable reports about the composition of private households¹ and the intra-household relationships between household members. The information on the variable should be available in the form of a matrix containing the relationships of each member to each other member of the household.

The household grid is a matrix in which each row and column corresponds to one member of the household, and where the relationship between the members is indicated by the standard categories in the cells where the row and column of the respective members are crossed. The matrix representation of the data allows a variety of information for dissemination and research purposes, including the intra-household relationships, household type, household size, partner relationships between household members (legal or de facto), and (together with the variable 'age') the composition of the household by age. The matrix being symmetric (e.g. if member 1 is son of member 2 then member 2 is father/mother of member 1) and the diagonal (that relates each member with himself/herself) being neutralised, information for only one half of the matrix (minus the diagonal) needs to be available in order to provide the full information. In practice however, collecting the full set of relations might be easier and avoid errors.

Category concept

1. Partner

A 'partner' can be defined according to the legal or de facto partnership/relationship status.

A 'husband or wife or civil partner' is identified according to the legal marital status, i.e. the (legal) conjugal status of each individual in relation to the marriage laws (or customs) of the country (i.e. de jure status), including civil partners. Members of same sex couples can be 'husband/wife/civil partner' if the marriage laws (or customs) of the country foresee this.

'Partner or cohabitee' is identified according to the de facto relationship, i.e. the partnership or relationship status of each individual in terms of his or her actual living arrangements within the household.

¹ As defined in Regulation (EU) 2019/1700 of the European Parliament and of the Council of 10 October 2019 establishing a common framework for European statistics relating to persons and households, based on data at individual level collected from samples, article 2; and Commission implementing regulation (EU) 2019/2181, of 16 December 2019 specifying technical characteristics as regards items common to several datasets pursuant to Regulation (EU) 2019/1700 of the European Parliament and of the Council, articles 2, 3 and 4.

2. Son or daughter

'Natural or adopted son or daughter' or 'stepson or stepdaughter' refers to a natural (biological), adopted or step member of the family (regardless of age or partnership/relationship status) who has usual residence in the household of at least one of the parents.

'Adoption' means taking and treating a biological child of other parents as one's own in so far as provided by the laws of the country. By means of a judicial process, whether related or not to the adopter, the adopted child acquires the rights and status of a biological child born to the adopting parents.

'Stepson or stepdaughter': a step-parent treats the child of his or her partner as one's own in so far as provided by the laws of the country, without adopting it.

3. 'Son or daughter-in-law' is a person who is the legal or the de facto partner of one's child.
4. 'Grand-child' means a child of ones' child including natural, adopted and step child.
5. Parents. The definition of 'parent' is the counterpart of the definitions for 'son or daughter' as provided under point 2.
6. A 'parent-in-law' is a person who is a parent of one's legal or de facto partner.
7. 'Grand-parent' means a parent of one's parent including natural, adoptive and stepparent.
8. 'Brother or sister' refers to biological, adoptive or stepbrothers or stepsisters.
9. 'Other relative' refers to other relatives (not included in the list outlined above) such as cousin, aunt/uncle, niece/nephew etc. and also covers grand-child-in-law, grand-parent-in-law and brother/sister-in-law.
10. 'Other non-relative' refers to non-relatives, such as au-pairs, cohabitating friends or students, etc.,. Foster children are also to be included in this category.

Categories for the variable

Household grid	Level of detail	
	Low level	High level
Partner	✓	
Husband or wife or civil partner		✓
Partner or cohabitee		✓
Son or daughter	✓	
Natural or adopted son or daughter		✓
Stepson or stepdaughter		✓
Son or daughter-in-law	✓	✓
Grand-child	✓	✓
Parent	✓	
Natural or adoptive parent		✓
Stepparent		✓
Parent-in-law	✓	✓
Grand-parent	✓	✓
Brother or sister	✓	
Natural brother or sister		✓
Step brother or sister		✓
Other relative¹	✓	✓
Other non-relative²	✓	✓
Not stated	✓	✓

¹⁾ For example: cousin; aunt/uncle; niece/nephew; grand-child-in-law; grand-parent-in-law; brother/sister-in-law

²⁾ For example: au-pairs, cohabitating friends or students

Implementation guidelines

A person is considered to be a member of the household when having his or her usual residence in the household.

Information from the EU-SILC, HBS and HETUS collections should be transmitted to Eurostat *at least* at the low level of detail.

Reference question (grid)

An example of a matrix representation for the household grid is provided below:

Line No	Name	Surname	Passing of birthday	YYYY	Interview date	Sex	Relationship matrix																
							OF	1	2	3	4	5	6	7	8	9	10	11	12				
1							1	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
2							2		■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
3							3			■	■	■	■	■	■	■	■	■	■	■	■	■	■
4							4				■	■	■	■	■	■	■	■	■	■	■	■	■
5							5					■	■	■	■	■	■	■	■	■	■	■	■
6							6						■	■	■	■	■	■	■	■	■	■	■
7							7							■	■	■	■	■	■	■	■	■	■
8							8								■	■	■	■	■	■	■	■	■
9							9									■	■	■	■	■	■	■	■
10							10										■	■	■	■	■	■	■
11							11											■	■	■	■	■	■
12							12												■	■	■	■	■
13							13													■	■	■	■

First name and surname might be collected but are not to be transmitted to Eurostat. Only the categories for the variable are to be transmitted to Eurostat.

(4) Partners living in the same household

Name of the variable

Partners living in the same household

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable describes whether an individual is living with a partner on the basis of his or her actual living arrangements within the private household, regardless of whether the relationship with the partner is legally registered (e.g. marriage or civil union) or a de facto relationship.

Category concept

The categories for the variable describe whether a person is living with a partner in the same household. A 'partner' can be defined according to the legal (husband or wife or civil partner) or de facto (partner or cohabitee) relationship status.

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source for which information on the variable is not reported systematically (e.g. persons below a certain age).

Categories for the variable

Partners living in the same household
Person living with a legal or de facto partner ¹
Person not living with a legal or de facto partner ¹
Not stated
Not applicable

¹ Husband/wife/civil partner/partner/cohabitee

Implementation guidelines

The variable 'partners living in the same household' needs to be transmitted in the following micro-data collections: AES, EHIS and ICT HH.

Eurostat will reconstruct the variable 'partners living in the same household' from the household grid for the following micro-data collections: EU-SILC, HBS and HETUS. For the EU-LFS, Eurostat can reconstruct the variable from the EU-LFS specific variable on spouse or cohabiting partner.

Based on his or her partnership/relationship status – legal or de facto –, a person is hereby considered to be living with a partner when sharing the usual residence with him or her. In other words, a person who has a partner living in a different household (persons living apart together) should be classified as 'person not living with a legal or de facto partner'. Accordingly, one-person households are also classified as 'person not living with a legal or de facto partner'.

A person is considered to be a member of the household when having his or her usual residence in the household.

Reference question

In order to collect the information on whether a person is living or not with a (legal or de facto) partner, the recommended question is the following: "Are you living with a partner in the same household?"

The wording of the question may be adapted so that the different cases of partner relationships – legal (husband/wife/civil partner) or de facto (partner/cohabitee) – can be covered.

(5) Household size

Name of the variable

Household size

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Households

Filter None

Concept The variable reports on the total number of members of a private household².

Category concept

The variable provides information on the exact number of members of the household and the category 'not stated'.

Categories for the variable

Household size
- Total number of members of the household
- Not stated

Implementation guidelines

The variable 'household size' needs to be transmitted in the following micro-data collections: AES, EHIS and ICT HH. Further information on the age of the household's members can be collected in accordance with implementing/delegated acts and the technical guidelines specific to each domain/micro-data collection, as well as for the purpose of equivalisation of the standardised variable 'net current monthly household income'.

Eurostat will reconstruct the variable 'household size' from the household grid for the following micro-data collections: EU-SILC, HBS and HETUS. For the EU-LFS, Eurostat can reconstruct the variable from the EU-LFS specific variable on household members.

² As defined in Regulation (EU) 2019/1700 of the European Parliament and of the Council of 10 October 2019 establishing a common framework for European statistics relating to persons and households, based on data at individual level collected from samples, article 2; and Commission implementing regulation (EU) 2019/2181, of 16 December 2019 specifying technical characteristics as regards items common to several datasets pursuant to Regulation (EU) 2019/1700 of the European Parliament and of the Council, articles 2, 3 and 4.

A person is considered to be a member of the household when having his or her usual residence in the household.

Reference question

The recommended question is: "How many people usually live in your household? Please include yourself."

(6) Household type

Name of the variable

Household type

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Households

Filter None

Concept The variable describes the household composition of the private household.

Category concept

The categories correspond to different types of household composition, where:

- A 'couple' is defined as a pair of individuals considered as partners in terms of their actual living arrangements within the household, regardless of whether the relationship with the partner is legally registered (e.g. marriage or civil union) or a de facto relationship.
- The term 'child or children' refers to the presence of son or sons or daughter or daughters in the household where:
 - Natural or adopted son or daughter or stepson or stepdaughter refers to a natural (biological), adopted or step member of the family (regardless of age or partnership or relationship status) who has usual residence in the private household of at least one of the parents;
 - 'adoption' means taking and treating a biological child of other parents as one's own in so far as provided by the laws of the country (by means of a judicial process, whether related or not to the adopter, the adopted child acquires the rights and status of a biological child born to the adopting parents);
 - the term 'stepson/stepdaughter' refers to a situation in which a step-parent treats the child of his/her partner as one's own in so far as provided by the laws of the country, without adopting it;
 - foster children and children-in-law are not covered by this category.
- A 'lone parent' is a parent not living with a (legal or de facto) partner in the same private household who has most of the day-to-day responsibilities in raising a child or children.

Categories for the variable

Household type
One-person household
Lone parent with at least one child aged less than 25
Lone parent with all children aged 25 or more
Couple without any child or children
Couple with at least one child aged less than 25
Couple with all children aged 25 or more
Other type of household
Not stated

Implementation guidelines

The variable 'household type' needs to be transmitted in the following micro-data collections: AES, EHIS and ICT HH.

Eurostat will reconstruct the variable 'household type' from the household grid for the following micro-data collections: EU-SILC, HBS and HETUS. For the EU-LFS, Eurostat can reconstruct the variable from the EU-LFS specific variables on the relationships to a 'reference person'³ and the ones on spouse or cohabiting partner, father and mother.

The approach based on the concept of a 'dependent child' – e.g. defined as "a person aged below 16 or a person aged between 16-24 who is economically inactive and living with at least one of his/her parents" – is not considered in the context of this variable, due to the difficulties related to its implementation.

In the case of EU-SILC and EU-LFS additional household categories including the concept of 'dependent child' will be constructed from the data transmitted.

A person is considered to be a member of the household when having his or her usual residence in the household.

The categories used for the variable 'household type' describing different types of household compositions refer only to one-generation (one-person household; couple without any children) or two-generation (lone parent with children; couple with children) households. Multigenerational households (like those consisting of more than two generations) should be classified as 'other type of household'.

Households with a different composition than one-person household, lone parent with at least one child or couple with or without children are to be classified as 'other type of household'. For example, households with three members where (a) two are a couple and the third is a nephew or (b) two are lone parent and his or her child and the third is the aunt of the lone parent are classified as 'other type of household'. 'Skip-generation households' are also included here.

In the context of the variable 'household type', two persons are considered as a 'couple' if they have legal (husband or wife or civil partner) or de facto (partner or cohabitee) relationship status and both have the usual residence in the same household.

³ In the EU-LFS, the relationship to a 'reference person' is to be collected, with the response options: 'partner', 'child', 'ascendant relative', 'other relative' and 'non-relative'. In addition, the sequence number of spouse, father and mother is to be collected for all household members.

In the context of the variable 'household type', the 25 year-old threshold needs to be considered for the children members of the household, in order to classify the household in the right category of 'household type'. More specifically, attention needs to be paid to whether there is at least one child aged less than 25 or, alternatively, all children are aged 25 or more. For example, a household of three members where one is a lone parent and the other two are children aged 24 and 26 would be classified in the category 'lone parent with at least one child aged less than 25'.

The concept of 'age in completed years' applies for the age of the children members of the household.

(7) Tenure status of the household

Name of the variable

Tenure status of the household

Scope

The social micro-data collections EU-SILC and HBS

Variable definition

Reporting unit Households

Filter Private households living in conventional dwellings⁴.

Concept The variable refers to the arrangements under which a private household occupies all or part of a housing unit.

Category concept

Owner with outstanding mortgage and owner without outstanding mortgage

Households of which at least one member is the owner of the housing unit in which the household lives, regardless whether any other member of the household is a tenant of all or part of the housing unit. A person is an owner if he or she possesses a title deed, independently of whether the house is fully paid or not. A reversionary owner should be considered as the owner. If the housing unit is owned by a relative (not living in the household) to one household member (e.g. by a parent to a child living in the household) the household member (e.g. child) does not qualify as an owner.

The categories 'owner with outstanding mortgage' and 'owner without outstanding mortgage' apply to the situations where the owner has to pay off at least one outstanding mortgage or has no mortgage taken to buy this housing unit, respectively.

Pay offs for mortgages and/or housing loans for any other housing unit (e.g. for a second dwelling) and/or for repairs, renovation, maintenance, or any non-housing purposes do not qualify. If the owner has already fully paid the principal of the mortgage and only the interest remains outstanding, the owner shall be considered as an owner with outstanding mortgage.

Tenant, rent at market price / tenant, rent at reduced price

Households of which at least one member is the tenant (housing unit directly rented from the owner (i.e. 'landlady' or 'landlord') or subtenant (housing unit rented from someone who himself is a tenant) of the housing unit in which the household lives, and where no household member is the owner of that housing unit. Households where at least one member pays partly rent and partly mortgage for the housing unit in which the household lives shall be classified under 'owner with outstanding mortgage' if the household member possesses a title deed.

The category 'tenant, rent at market price' applies to households of which at least one member is the tenant or subtenant who pays rent at prevailing or market prices. The category also applies where rent

⁴ Definition of 'conventional dwelling' in line with Regulation (EC) No1201/2009

at market price is paid but is partly or wholly recovered from housing benefits or other sources, including public, charitable, or private sources.

The category 'tenant, rent at reduced price' covers households living in housing units at a reduced price, i.e. a price is below the market price (but not rent-free), and includes cases where the price reduction is granted

- (a) by law
- (b) as a result of a social housing scheme
- (c) for private reasons
- (d) by an employer

Tenant, rent free

This category covers households living in housing units rent-free, i.e. where no rent is paid, and includes cases where the free rent is granted

- (a) by law
- (b) as a result of a social housing scheme
- (c) for private reasons
- (d) by an employer

Not applicable

The category 'not applicable' covers all private households that do not live in conventional dwellings as defined in Regulation (EC) No 1201/2009⁵.

Categories for the variable

Tenure status of household
Owner without outstanding mortgage
Owner with outstanding mortgage
Tenant, rent at market price
Tenant, rent at reduced price ¹
Tenant, rent free
Not stated
Not applicable

¹) It could be for example, as a result of social policy or granted privately or by employer. The same reasons refer also to "rent free" category.

Implementation guidelines

For the concerned data collections, the tenure status of the household variable is to be included in the micro-data file transmitted to Eurostat.

Reference question

The recommended question is: "Does your household own this housing unit or do you rent it?", followed by:

⁵ <http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1412688906102&uri=CELEX:32009R1201>

"Do you still have to repay money from an outstanding loan or mortgage for this accommodation?" in case that the household is the owner; or by:

"Does your household rent this housing unit at market price, below market price, or use it free of charge?" in the case that the household is renting the housing unit.

(8) Main activity status (self-defined)

Name of the variable

Main activity status (self-defined)

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable refers to a person's own perception of his or her current main activity status. The different statuses refer to socially relevant categories including labour market participation, but also consider several categories of social status for persons where employment is not the main activity. It does not apply criteria of a specific concept e. g. of labour market participation as defined by the International Labour Organisation (ILO)⁶.

More than one activity status can apply to a person but relevant for this variable is only the most important one for the respondent. The main status refers to the current situation (situation at the moment of the data collection/interview).

Category concept

The main activity status is self-assessed by the respondent and the chosen category should appropriately describe how a person mainly perceives him or herself. The relevant categories to choose among are predefined in a list (see categories for the variable). The categories are logically not mutually exclusive and do not have a hierarchical order.

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

⁶ See http://ec.europa.eu/eurostat/statistics-explained/index.php/EU_labour_force_survey_-_methodology

Categories for the variable

Main activity status (self-defined)
Employed
Unemployed
Retired
Unable to work due to long-standing health problems
Student, pupil
Fulfilling domestic tasks
Compulsory military or civilian service
Other
Not stated
Not applicable

Implementation guidelines

The variable results are very sensitive to the way of implementation, especially question wording and category wording or order.

The information should not be derived and it should be collected by using a single question.

All categories representing an activity status have to be presented to the respondent and there should be no change in the order or number of categories; in order to get comparable results it must be the same across all surveys. After data collection, categories can be grouped for other purposes (e.g. dissemination or analysis). The category 'compulsory military or civilian service' may not apply in all countries and in this case it can be dropped. The category 'other' should only be offered to the respondent if he/she cannot choose one of the proposed categories. In PAPI it is unavoidable to offer this category right away.

Self-perception means the variable shall capture how people perceive themselves, not how they meet certain objective criteria. Where more than one status applies to the person, the respondent should select the category that best describes his/her situation. No criteria for that are specified but it could be determined by the status/activity with the most time spent.

In cases where respondents cannot spontaneously choose one category, especially when several categories apply to them, the interviewer can give some help for clarification. A PAPI questionnaire can give explanations (preferably in an annex). Concrete proposals, which category should be chosen, should not be given. It can be explained if a category is appropriate to be chosen. In principle it applies that there is no wrong assignment. It only depends on the self-perception of the respondent:

- Respondents can consider themselves being *employed* irrespective of their official labour market status, working time or kind of income from employment. They can also be looking for another job in parallel. Also other categories can apply to them as long as they consider employment to be their main activity. Vice versa, persons who would choose another main activity status can also be in employment. For instance, many people who would regard themselves as full-time students or mainly fulfilling domestic tasks can have a job. In that case they can assign themselves to the corresponding category. Respondents helping in the family business, even if it is unpaid, can consider themselves as employed.

- Respondents can see themselves as being *unemployed* irrespective of an official status or a registration with the public employment agency. Unemployed can also have minor jobs while seeking for a main job.
- Respondents who are in various forms of vocational education or training that (partly) takes place at the work site can consider themselves as being in employment. This also applies to apprentices, as well as paid trainees or interns, who can consider themselves as being in employment, while persons having an unpaid work-based training may assign themselves to the category *student, pupil*.
- Respondents who mainly perceive themselves as a *housewife or househusband* can choose the category 'fulfilling domestic tasks' even if they also have a job, receive a pension or are retired. The category 'fulfilling domestic tasks' includes all activities needed to run a private household including the raising of children.
- Respondents can consider themselves as *retired* if they receive a pension or if they have finally stopped working or given up their business because of their age or age related health condition. Still, they could work e.g. in a minor job. Persons in early retirement that is not connected to health issues can also choose this category.
- Persons who have not reached retirement age but are unable to work due to health reasons or disabilities for a longer or undetermined time can choose the category *unable to work due to long-standing health problems*. It is independent from the benefit they receive. Persons who are in early retirement due to health reasons can choose this category if they do not rather consider themselves as retired.
- Persons who cannot choose one of the presented activity status categories can select the category 'other'. These can be e. g. volunteers or mainly inactive persons. Also these persons could e.g. have a job or fulfil domestic tasks. Young children who are not in education yet can be counted in this group.
- Respondents on maternity or parental leave can consider themselves either as employed or as fulfilling domestic tasks.

The variable refers to the current status, i.e. no reference period should be mentioned.

The categorisation is solely self-defined and may not be changed due to plausibility checks or for any other reason (corrections/imputations) except by retrieving it again from the respondent.

(9) Full- or part-time main job (self-defined)

Name of the variable

Full- or part-time main job (self-defined)

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Persons in employment⁷ (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable refers to the main job of a person in employment. This main job can be a full-time job or a part-time job. The distinction should be based on the respondent's own perception referring to the usual hours worked in the main job.

The term job is used in reference to employment. One job is a set of tasks and duties performed for a single economic unit. Persons may have one or several jobs. For employees, each contract can be considered as a separate set of tasks and duties, and consequently as a separate job. Those in self-employment will have as many jobs as the economic units they own or co-own, irrespective of the number of clients served. In cases of multiple job-holding, the main job is that with the longest hours usually worked, as defined in the international statistical standards on working time.

Category concept

Following the definition of the 81st International Labour Conference a person who works in a part-time job normally works fewer hours than a comparable full-time worker. The distinction refers to the hours a person works usually in the main job regarding a long reference period. It is self-defined meaning that it is up to the respondent to decide if his/her main job in the context of his/her profession or enterprise is part- or full-time.

The category 'not applicable' covers persons not in employment. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

⁷ Information on whether a person is in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

Categories for the variable

Full- or part-time main job (self-defined)
Full-time job
Part-time job
Not stated
Not applicable

Implementation guidelines

In household surveys the distinction between a full-time and part-time job should be made on the basis of the self-assessment given by the respondent. If this answer does not come spontaneously from the respondent the following guidance can be given:

A person in a *part-time* job works less than a comparable full-time worker having a job in the same occupation and in the same local unit. For persons who cannot compare working hours because e.g. they are working alone, the benchmark is the group of people who work in the same occupation and the same branch of industry.

A *long reference period* means at least four weeks and ideally three months. Weeks with absences due to e.g. holidays, leaves or strikes should not be taken into account. In case of very irregular working hours or a job that has just been started, an average regarding the last four weeks or contractual hours can be used as a proxy.

Working hours comprise (1) the time spent at the workplace, meaning the place where work tasks and duties are normally carried out, and (2) the time used for carrying out work tasks outside the workplace even if they are not directly paid. This includes the work of *teachers* outside the classroom. Only the hours of the main job are counted.

On-call time is only counted if it is spent at the workplace or implies high restrictions on the person in employment. The *main meal break* is not counted as working time even if spent at the workplace. *Travelling time* for business trips is counted but not commuting time. *Training time* is counted as working time if it is within working hours, required by the employer or directly connected to the main job. Absences during working time for personal reasons are not to be counted as working time. Farmer's working time for own use production is not counted as working time.

The categorisation into full- or part-time is solely self-assessed and may not be changed due to plausibility checks by using information on usual working hours stated elsewhere except by confirming the information given by the respondent him or herself. Uniform corrections are not appropriate because the typical volume of a full-time worker can vary between branches, local units etc. The self-assessment of the respondent can be seen as the more reliable way to collect this information.

If the respondent has several jobs, the main job is the one where the respondent usually works the most hours.

(10) Permanency of main job

Name of the variable

Permanency of main job

Scope

The social micro-data collections concerned are EU-SILC, EU-LFS and HBS

Variable definition

Reporting unit Individuals

Filter Persons in employment⁸ who are employees (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable distinguishes whether the contract of the main job has a limited duration (i.e. the job will terminate after a predefined period), or is a permanent contract without a fixed end. The variable refers to the main job.

What counts is the contractual (or the informal or verbal arrangement) arrangement of the employment relationship, and not the expectation that the respondent might have to lose the job, his or her plan to leave it, his or her wish to stay or the probability to stay there permanently.

The term job is used in reference to employment. One job is a set of tasks and duties performed for a single economic unit. Persons may have one or several jobs. For employees, each contract can be considered as a separate set of tasks and duties, and consequently as a separate job. In cases of multiple job-holding, the main job is that with the longest hours usually worked, as defined in the international statistical standards on working time.

Category concept

A job with a fixed-term contract or agreement will terminate either after a period of time determined in advance (by a known date), or after a period not known in advance, but nevertheless defined by objective criteria, such as the completion of an assignment or the period of absence of an employee temporarily replaced.

A job with a contract or agreement that has no such predefined end is counted as permanent.

The category 'not applicable' covers persons not in employment and persons in employment who are not employees. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

⁸ Information on whether a person is in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

Permanency of main job
1.Fixed-term contract 1.a.Fixed-term written contract 1.b.Fixed term verbal contract 2. Permanent job 2.a. Permanent written contract 2.b. Permanent verbal contract 3. Not stated 4. Not applicable

Implementation guidelines

The Member States have a possibility to choose between the categories 1, 2, 3, 4, or have a choice to use a higher level of detail for categories 1 and 2 (i.e. 1a, 1b, 2a, 2b). The operational criteria for defining informal (without written agreement/contract) jobs of employees are to be determined in accordance with national circumstances and data availability.

Seasonal workers are counted as having a fixed-term contract, as well as persons having a contract for a probationary period.

For temporary employment agency workers the categorisation depends on the type of contract with the employment agency. They are counted as having a permanent job only if there is a work contract of unlimited duration with the employment agency.

If the respondent has several jobs, the main job is the one where the respondent usually works the most hours.

(11) Educational attainment level

Name of the variable

Educational attainment level (highest level of education successfully completed)

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The educational attainment level of an individual is the highest ISCED (International Standard Classification of Education 2011) level successfully completed, the successful completion of an education programme being validated by a recognised qualification, i.e. a qualification officially recognised by the relevant national education authorities or recognised as equivalent to another qualification of formal education. In countries where education programmes, in particular those belonging to ISCED levels 1 and 2, do not lead to a qualification the criterion of full attendance of the programme and normally gaining access to a higher level of education may have to be used instead. When determining the highest level, both general and vocational education should be taken into consideration.

The concept of a “successful completion of an education programme” typically corresponds to the situation in which a pupil or student attends courses or classes and obtains the final credential associated with a formal education programme. In this respect, educational attainment level corresponds to the highest level successfully completed in the ISCED ladder.

Category concept

The educational attainment level is defined according to the International Standard Classification of Education 2011 (ISCED 2011, see <http://uis.unesco.org/sites/default/files/documents/international-standard-classification-of-education-isced-2011-en.pdf> – ISCED-A for levels of educational attainment).

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

The level of detail needed is context-specific for each micro-data collection.

Educational attainment level	ISCED-A codes ¹	Level of detail ²		
		L	M	H
No formal education or below ISCED 1	0	✓	✓	✓
ISCED 1 Primary education	1	✓	✓	✓
ISCED 2 Lower secondary education³	2	✓	✓	✓
ISCED 3 Upper secondary education³	3	✓		
<i>ISCED 3 Upper secondary education – general</i>	34		✓	
<i>ISCED 3 Upper secondary education (general) – partial level completion, without direct access to tertiary education</i>	342			✓
<i>ISCED 3 Upper secondary education (general) – level completion, without direct access to tertiary education</i>	343			✓
<i>ISCED 3 Upper secondary education (general) – level completion, with direct access to tertiary education</i>	344			✓
<i>ISCED 3 Upper secondary education (general) – without possible distinction of access to tertiary education</i>	-			✓
<i>ISCED 3 Upper secondary education – vocational</i>	35		✓	
<i>ISCED 3 Upper secondary education (vocational) – partial level completion, without direct access to tertiary education</i>	352			✓
<i>ISCED 3 Upper secondary education (vocational) – level completion, without direct access to tertiary education</i>	353			✓
<i>ISCED 3 Upper secondary education (vocational) – level completion, with direct access to tertiary education</i>	354			✓
<i>ISCED 3 Upper secondary education (vocational) – without possible distinction of access to tertiary education</i>	-			✓
<i>ISCED 3 Upper secondary education – orientation unknown</i>	-		✓	
<i>ISCED 3 Upper secondary education (orientation unknown) – partial level completion, without direct access to tertiary education</i>	-			✓
<i>ISCED 3 Upper secondary education (orientation unknown) – level completion, without direct access to tertiary education</i>	-			✓
<i>ISCED 3 Upper secondary education (orientation unknown) – level completion, with direct access to tertiary education</i>	-			✓
<i>ISCED 3 Upper secondary education (orientation unknown) – without possible distinction of access to tertiary education</i>	-			✓
ISCED 4 Post-secondary non-tertiary education³	4	✓		
<i>ISCED 4 Post-secondary non-tertiary education – general</i>	44		✓	✓
<i>ISCED 4 Post-secondary non-tertiary education – vocational</i>	45		✓	✓
<i>ISCED 4 Post-secondary non-tertiary education – orientation unknown</i>	-		✓	✓

Educational attainment level	ISCED-A codes ¹	Level of detail ²		
		L	M	H
ISCED 5 Short-cycle tertiary education³	5	✓		
<i>ISCED 5 Short-cycle tertiary education – general</i>	54		✓	✓
<i>ISCED 5 Short-cycle tertiary education – vocational</i>	55		✓	✓
<i>ISCED 5 Short-cycle tertiary education – orientation unknown</i>	-		✓	✓
ISCED 6 Bachelor's or equivalent level³	6	✓	✓	✓
ISCED 7 Master's or equivalent level³	7	✓	✓	✓
ISCED 8 Doctoral or equivalent level³	8	✓	✓	✓
Not stated		✓	✓	✓
Not applicable		✓	✓	✓

¹⁾ ISCED-A codes are indicated where there is a one-to-one correspondence between the variable categories and ISCED-A categories. Additional categories are necessary to take into account situations of incomplete information on access to tertiary education or orientation.

²⁾ L = low level of detail; M = medium level of detail; H = high level of detail.

³⁾ Please note that in its coding of education programmes (ISCED-P), ISCED 2011 contains a special category for levels 2 to 8: 'insufficient for level completion'. (This category also includes 'insufficient for partial level completion' for levels 2 and 3). The educational attainment level associated with successful completion of programmes 'insufficient for level completion' should be classified as ISCED level X-1, even if there are no programmes at level X-1 in that country. For example, the educational attainment level associated with a vocational ISCED level 3 programme classified as insufficient for level/partial level completion (ISCED-P 351) is classified as ISCED-A 254.

Implementation guidelines

Joint Eurostat-OECD guidelines on the measurement of educational attainment in household surveys are available here: <https://circabc.europa.eu/w/browse/c2dc65ad-5163-4935-b0c2-e5ea1f44929b>.

Coding of the variable should be based on the ISCED integrated mapping which is elaborated in each country. An ISCED integrated mapping is a table including information on national educational programmes and qualifications, their main characteristics and coding in ISCED. One column of this table provides coding of the educational attainment level to be used in the EU Labour Force Survey (at high level of detail).

When determining the highest educational level, both general and vocational education should be taken into consideration. If a person has successfully completed more than one programme at the same ISCED level, the most recent qualification should be reported (see ISCED 2011, § 87).

Persons who have attended but not successfully completed a formal education programme should be coded according to the highest level of the formal programme that they have (previously) successfully completed.

Qualifications from "old" educational programmes (not existing anymore) should be classified on the basis of their characteristics at the time of completion.

For ISCED levels 3, 4 and 5 the standard category 'orientation unknown' should only be used if information on the orientation of the programme is not available.

The standard category "ISCED 3 Upper secondary education, without possible distinction of access to tertiary education" should only be used when a distinction between different ISCED level 3 programmes (giving or not giving access to tertiary education) is not possible.

A person having successfully completed an ISCED 2011 level 3 programme of “partial level completion” (codes 342 and 352 of ISCED-P) is classified in the standard category “ISCED 3 Upper secondary education – partial level completion, without direct access to tertiary education” and her/his educational attainment level is considered as ISCED level 3. For further clarification see the Annex for EU countries of the joint Eurostat-OECD guidelines on the measurement of educational attainment.

All questions about implementation of ISCED in surveys may be addressed to the national ISCED coordinator who was nominated in each country to ensure coherence of the variable “educational attainment level” in different sources.

Information for the different micro-data collections will be transmitted to Eurostat as follows:

Micro-data collection	Level of detail		
	High	Medium	Low
EU-SILC	X (age 16-34)	X (age 35+)	
EU-LFS	X (15+)		
HBS			X (16+)
AES	X		
EHIS			X
HETUS			X
ICT HH			X

Reference question

The “diploma approach” where respondents are asked about their diplomas instead of the level of education completed is highly recommended. For details on the “diploma approach” see the joint Eurostat-OECD guidelines on the measurement of educational attainment in household surveys.

Alternatively, the question(s) for this variable should be phrased by countries in a way that the concept of educational attainment level (qualification officially recognised by the relevant national education authorities or recognised as equivalent to another qualification of formal education) is described as fully as possible. This can be achieved by listing the formal education programmes/qualifications (or categories thereof).

(12) Participation in formal education and training (student or apprentice) in <reference period>

Name of the variable

Participation in formal education and training (student or apprentice) in <reference period>

Scope

The social micro-data collections EU-SILC, EU-LFS, HBS, AES and HETUS

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable measures a person's participation in formal education and training, i.e. whether the person has been enrolled as a student or apprentice in a programme of formal education during the reference period.

The reference period can be currently, during the last 4 weeks or during the last 12 months.

The variable provides information on the number of persons participating in formal education and training during a specified reference period. It can refer to the 'current situation', i.e. on the current status as a student or apprentice, or to a longer reference period. The specification of the reference period has an impact on the output data and their interpretation.

The 12-month period provides information on the number of persons involved in education and training in a given year. This longer period allows capturing more activities and avoids seasonal effects. It corresponds to the reference period used in targeted education surveys (Adult Education Survey).

Formal education is defined according to the International Standard Classification of Education 2011 (ISCED 2011) as "education that is institutionalised, intentional and planned through public organizations and recognised private bodies and – in their totality – constitute the formal education system of a country.

Formal education programmes are thus recognised as such by the relevant national education authorities or equivalent authorities, e.g. any other institution in cooperation with the national or sub-national education authorities. Formal education consists mostly of initial education. Vocational education, special needs education and some parts of adult education are often recognised as being part of the formal education system." (ISCED 2011 glossary)

The ISCED definition of (formal) education includes (formal) training.

For ISCED 2011, see <http://uis.unesco.org/sites/default/files/documents/international-standard-classification-of-education-isced-2011-en.pdf>.

Category concept

The response categories are 'yes' or 'no'.

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on that variable (e.g. persons below a certain age).

Categories for the variable

Participation in formal education and training (student or apprentice) in <reference period>
Yes
No
Not stated
Not applicable

Implementation guidelines

For the implementation of the variable in a data source, careful consideration should be given to the specification of the reference period because it impacts on the output data and their interpretation. Data on that variable coming from different data sources are only comparable if all data sources apply the same reference period.

Only formal education programmes that represent at least the equivalent of one semester (or one-half of a school/academic year) of full-time study should be covered.

Formal education and training includes modules (short programmes/courses) which may be part of a longer regular education programme and which give to their graduates the corresponding academic credit, independent of whether the person continues to complete the full programme.

In countries with a modular education system and in cases when it is difficult to assess whether a module is “formal” or not, a question on the purpose of the module can be added: if intended to be used in a formal programme in the immediate future, it can be considered as formal itself.

Students who were on school/academic holiday during the reference period and will continue their studies after this holiday break (or plan to continue) should be counted in the standard category “yes”. (This issue mainly applies when the current situation is measured.)

Apprentices who are in a period of “on-the-job training” or alternate “on-the-job” and “in-school learning” within the framework of an alternate (e.g. dual) programme should be counted in the standard category “yes”, since they are enrolled in a qualifying programme.

All questions about implementation of ISCED in surveys may be addressed to the national ISCED coordinator who was nominated in each country to ensure coherence of the application of ISCED 2011 in different sources.

Information on the reference period for the different micro-data collections (as stated in Annex I of the IESS draft regulation).

Micro-data collection	Reference period
EU-SILC	Current (16+)
EU-LFS	4 weeks (15+), 12 months (15+)
HBS	Current (16+)
AES	12 months
HETUS	Current (age to be defined)

Reference question

During the <reference period>, (that is since <<month, year>>) have you participated (as a student or apprentice) in formal education or training (<any of the following formal education or training programmes>)?

The question(s) for this variable should be phrased by countries in a way that the concept of formal education and training – designed to lead to a qualification/certificate recognised by the relevant national education authorities – is described as fully as possible. This can be achieved by listing the formal education programmes/qualifications (or categories thereof).

(13) Level of the current or most recent formal education or training activity

Name of the variable

Level of the current/most recent formal education or training activity

Scope

The social micro-data collections EU-SILC, EU-LFS, HBS, AES and HETUS

Variable definition

Reporting unit Individuals

Filter Individuals who participated in formal education or training during the reference period (and who are in the survey target population).

Concept The variable measures the level of the formal education or training activity in which a person participated during a given reference period. Depending on the reference period, the variable refers to the current or to the most recent formal education or training activity.

Category concept

The level of the current/most recent formal education or training activity is defined according to the International Standard Classification of Education 2011 (ISCED 2011, see <http://uis.unesco.org/sites/default/files/documents/international-standard-classification-of-education-isced-2011-en.pdf> – ISCED-P for education programmes).

The category 'not applicable' covers people who did not participate in formal education or training during the reference period. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

The level of detail needed is context-specific for each micro-data collection.

Level of the current/most recent formal education or training activity	ISCED-P ¹ codes	Level of detail	
		Low	High
ISCED 0 Early childhood education	0	✓	✓
ISCED 1 Primary education	1	✓	✓
ISCED 2 Lower secondary education	2	✓	✓
ISCED 3 Upper secondary education	3	✓	
<i>ISCED 3 Upper secondary education – general</i>	34		✓
<i>ISCED 3 Upper secondary education – vocational</i>	35		✓
<i>ISCED 3 Upper secondary education – orientation unknown</i>	-		✓
ISCED 4 Post-secondary non-tertiary education	4	✓	
<i>ISCED 4 Post-secondary non-tertiary education – general</i>	44		✓
<i>ISCED 4 Post-secondary non-tertiary education – vocational</i>	45		✓
<i>ISCED 4 Post-secondary non-tertiary education – orientation unknown</i>	-		✓
ISCED 5 Short-cycle tertiary education	5	✓	
<i>ISCED 5 Short-cycle tertiary education – general</i>	54		✓
<i>ISCED 5 Short-cycle tertiary education – vocational</i>	55		✓
<i>ISCED 5 Short-cycle tertiary education – orientation unknown</i>	-		✓
ISCED 6 Bachelor’s or equivalent level	6	✓	✓
ISCED 7 Master’s or equivalent level	7	✓	✓
ISCED 8 Doctoral or equivalent level	8	✓	✓
Not stated		✓	✓
Not applicable		✓	✓

¹⁾ ISCED-P codes are indicated where there is a one-to-one correspondence between the variable categories and ISCED-P categories. Additional categories are necessary to take situations of incomplete information on orientation into account.

Implementation guidelines

The variable is only collected for participants in at least one formal education or training activity during the reference period.

The level of the current/most recent formal education or training activity refers to the programme in which the student or apprentice is/was enrolled (i.e. coding according to ISCED-P for education programmes).

For ISCED levels 3, 4 and 5 the standard category 'orientation unknown' should only be used if information on the orientation of the programme is not available.

If the person participated in several formal education programmes during the reference period, the level should refer to the most recent programme.

If the person is or was enrolled to several formal education programmes at the same time, the information on the level should refer to the programme with the highest level.

For students who were on school/academic holiday during the reference period and will continue their studies after their holiday break (or plan to continue), the level should refer to the level of education attended before their holiday break.

Coding of the variable should be based on the ISCED integrated mapping which is elaborated in each country. An ISCED integrated mapping is a table including information on national educational programmes and qualifications, their main characteristics and coding in ISCED.

All questions about implementation of ISCED in surveys may be addressed to the national ISCED coordinator who was nominated in each country to ensure coherence of the application of ISCED 2011 in different sources.

Information for the different micro-data collections will be transmitted to Eurostat as follows:

Micro-data collection	Level of detail	
	High	Low
EU-SILC	X (age 16-34)	X (age 35+)
EU-LFS	X (age 15+)	
HBS		X (16+)
AES	X	
HETUS	To be decided later	

Reference question

What is/was the level of the current/most recent formal education or training activity <level of the corresponding formal education or training programme>?

The question(s) for this variable should be adapted to the national phrasing of the question for the variable “Participation in formal education and training (student or apprentice) in <reference period>”.

(14) Country of birth

Name of the variable

Country of birth

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The country of birth of an individual is defined as the country of *usual residence* (in its current boundaries) of the individual's mother at the time of delivery.

Information on the country of birth is used to distinguish between native-born (born in the reporting country) and foreign-born (born in a country other than the reporting country) residents.

Category concept

The list of countries is defined according to the Eurostat Standard Code list (SCL) GEO which is largely based on the International Organization for Standardization (ISO) 3166 country codes (3166-1 alpha-2). The SCL GEO is available here:

http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=CL_GEO&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIERARCHIC

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on variable (e.g. persons below a certain age).

Categories for the variable

Country of birth
Country of birth (SCL GEO code)
Foreign-born but country of birth unknown
Not stated
Not applicable

Implementation guidelines

Information on the country of birth should be obtained according to the current national boundaries and not according to the boundaries in place at the time of birth (entries such as Czechoslovakia, Yugoslavia etc. shall not be used for this variable).

More detailed information on the locality could be required if the boundaries of a country have changed. When data are collected by interview, the respondent can be asked additional questions. When data are derived from administrative registers, it is more difficult to ensure that the definition is followed. If detailed information on the mother's place of usual residence exists in the register, the country of birth should be re-coded so that it is coded according to the current national borders.

Particular care is needed in cases where national boundaries have changed and/or where previously existing countries have split to form two or more new countries. As noted in the UNECE 2020 census recommendations⁹ (par. 651), a person should not be regarded as foreign-born (i.e. recorded as born in a country other than the reporting country) simply because the national boundaries of the country of birth have changed. The following important exception to the general rule of considering the current borders might exist: a person whose mother's place of usual residence was, at the time of his/her birth, part of the person's *actual* country of origin (e.g. as indicated by his/her citizenship or current place of usual residence) but is not any more due to changed borders. In this case the country of birth can exceptionally be enumerated at the boundaries at the time of birth.

The country of birth of a person, who was born during the mother's short-term visit to a country other than her country of usual residence, should be the country where the mother had her place of usual residence. Only if information on the place of usual residence of the mother at the time of the birth is not available, the place where the birth took place should be reported.

Reference question

In case the information is available from administrative sources it might not be necessary to ask the respondents directly. When this information needs to be asked to the respondents the recommended question is: "In which country were you born?"

In situations (e.g. specific countries or regions) where this question may not capture appropriately the information on the place of *usual residence* of the individual's mother at the time of delivery, the following question should be asked: "Which was the country of usual residence of your mother at the time when you were born?"

⁹ <http://www.unece.org/stats/census.html>

(15) Country of main citizenship

Name of the variable

Country of main citizenship

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable reports on the country of the person's main citizenship. 'Citizenship' is defined as the particular legal bond between an individual and his or her State, acquired by birth or naturalisation, whether by declaration, choice, marriage or other means according to national legislation.

A person with two or more citizenships shall be allocated to only one country of citizenship, to be determined in the following order of precedence:

1. If one of the person's citizenship is the reporting country, it shall be recorded as the country of main citizenship;
2. If the person does not have the citizenship of the reporting country but one of another Member State, it shall be recorded as the person's main citizenship.
3. If the person does not have the citizenship of the reporting country but multiple citizenships of other Member States, the person may choose which of his/her EU citizenships is to be recorded;
4. If the person does not have the citizenship of any Member State, the person may choose which of his/her citizenships is to be recorded.

If the information on the person's country of citizenship is not available (e.g. in case the information is obtained from administrative sources), the reporting country may determine which country of citizenship is to be allocated.

Information on the country of main citizenship is used to distinguish between national citizens (individuals having the citizenship of the reporting country), non-national citizens (individuals having the citizenship of a country other than the reporting country) and stateless persons.

Category concept

The list of countries is defined according to the Eurostat Standard Code list (SCL) GEO which is largely based on the International Organization for Standardization (ISO) 3166 country codes (3166-1 alpha-2). The SCL GEO is available here:

http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=CL_GEO&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIERARCHIC

The category 'stateless' corresponds to a person without recognized citizenship of a state.

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Country of main citizenship
Country of main citizenship (SCL GEO code)
Stateless
Foreign citizenship but country unknown
Not stated
Not applicable

Implementation guidelines

Information on the country of main citizenship should be obtained in accordance with the current administrative status/legal situation of the individual.

The category 'country of main citizenship (SCL GEO code)' may also be used for the transmission of information on 'recognised non-citizens'. A recognized-non citizen is a person who is not a citizen of the reporting country nor of any other country, but who has established links to that country which include some but not all rights and obligations of full citizenship. A majority of these persons were citizens of the former Soviet Union living in the Baltic States who are permanently resident in these countries but have not acquired any other citizenship. Recognised non-citizens are not included in the number of European Union (EU) citizens.

Reference question

In case the information is available from administrative sources it might not be necessary to ask the respondents directly. When this information needs to be asked to the respondents the recommended question is: "What is your citizenship?"

(16) Country of birth of the father

Name of the variable

Country of birth of the father

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable reports on the country of birth of the person's father, i.e. the country of *usual residence* (in its current borders, if the information is available) of the mother of the person's father at the time of the delivery, or, failing this, the country (in its current borders, if the information is available) in which the birth of the person's father took place. 'Father' is a male parent of a 'son or daughter', either natural (biological), adoptive or stepfather.

Information on the country of birth of the father allows to determine whether the person's father is native-born (born in the reporting country) or foreign-born (born in a country other than the reporting country).

Category concept

The list of countries is defined according to the Eurostat Standard Code list (SCL) GEO which is largely based on the International Organization for Standardization (ISO) 3166 country codes (3166-1 alpha-2). The SCL GEO is available here:

http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=CL_GEO&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIERARCHIC

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Country of birth of the father
Country of birth of the father (SCL GEO code)
Father foreign-born but country of birth of the father unknown
Not stated
Not applicable

Implementation guidelines

Information on the country of birth of the father should be obtained according to the same rules as provided for the variable 'country of birth'.

In case of a person having not only a natural (biological) father but also e.g. an adoptive or stepfather, the country of birth should refer to who actually raised the person and acted as father in an affective or legal sense, e.g. the male guardian.

In case of a person with same-sex parents, both being female, this variable could be used to report the country of birth of one of the mothers.

Reference question

The proposed reference question is: "In which country was your father born?"

In situations (e.g. specific countries or regions) where this question may not capture appropriately the information on the place of *usual residence* of the mother of the person's father at the time of delivery, the following question should be asked: "Which was the country of usual residence of your father's mother at the time when he was born?"

(17) Country of birth of the mother

Name of the variable

Country of birth of the mother

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable reports on the country of birth of the person's mother, i.e. the country of *usual residence* (in its current borders, if the information is available) of the mother of the person's mother at the time of the delivery, or, failing this, the country (in its current borders, if the information is available) in which the birth of the person's mother took place. 'Mother' is a female parent of a 'son or daughter', either natural (biological), adoptive or stepmother.

Information on the country of birth of the mother allows to determine whether the person's mother is native-born (born in the reporting country) or foreign-born (born in a country other than the reporting country).

Category concept

The list of countries is defined according to the Eurostat Standard Code list (SCL) GEO which is largely based on the International Organization for Standardization (ISO) 3166 country codes (3166-1 alpha-2). The SCL GEO is available here:

http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=CL_GEO&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIERARCHIC

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Country of birth of the mother
Country of birth of the mother (SCL GEO code)
Mother foreign-born but country of birth of the mother unknown
Not stated
Not applicable

Implementation guidelines

Information on the country of birth of the mother should be obtained according to the same rules as provided for the variable 'country of birth'.

In case of a person having not only a natural (biological) mother but also e.g. an adoptive or stepmother, the country of birth should refer to who actually raised the person and acted as mother in an affective or legal sense, e.g. the female guardian.

In case of a person with same-sex parents, both being male, this variable could be used to report the country of birth of one of the fathers.

Reference question

The proposed reference question is: "In which country was your mother born?"

In situations (e.g. specific countries or regions) where this question may not capture appropriately the information on the place of *usual residence* of the mother of the person's mother at the time of delivery, the following question should be asked: "Which was the country of usual residence of your mother's mother at the time when she was born?"

(18) Country of residence

Name of the variable

Country of residence

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals or households

Filter None

Concept The country of residence is the country in which the person or the household has their usual residence.

Category concept

The list of countries is defined according to the Eurostat Standard Code list (SCL) GEO which is largely based on the International Organization for Standardization (ISO) 3166 country codes (3166-1 alpha-2). The SCL GEO is available here:

http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=CL_GEO&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIERARCHIC

Categories for the variable

Country of residence
Country of residence (SCL GEO code)

Implementation guidelines

Information on the country of residence should be obtained in accordance with the current national boundaries.

To the extent to which all possible participants in a specific social micro data-collection need to be *usual residents*, the country of residence of all the reporting units corresponds to the reporting country. Consequently, a reference question is not needed for this variable.

(19) Duration of stay in the country of residence in completed years

Name of the variable

Duration of stay in the country of residence in completed years

Scope

The social micro-data collections EU-SILC, EU-LFS and AES

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable describes the interval of time since the point in time when a person most recently established his or her *usual residence* in the reporting country, expressed in completed years.

Category concept

The category 'number of years in this country (since last establishing the place of usual residence in this country)' are integer numbers describing the time span between the point in time when a person most recently established his/her *usual residence* and the reference date¹⁰, in completed years.

The time span includes the lower limit and excludes the upper limit. For example, a person who has arrived on 1st of March 2011 shall be classified in the category '3 years' if interviewed in February 2015 but in the category '4 years' if interviewed in March 2015.

The category 'born in this country and never lived abroad for a period of at least 1 year' covers those persons who are native-born, i.e. born in the reporting country (see variable 'country of birth'), and have never had their usual residence in a country other than the reporting country for at least 1 year.

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Duration of stay in the country of residence in completed years
Born in this country and never lived abroad for a period of at least 1 year
Number of years in this country (since last establishing the place of usual residence in this country) (2-digits)
Not stated
Not applicable

¹⁰The reference date is specific to each social micro-data collection (see variable 'age in completed years').

Implementation guidelines

The duration of stay refers to the current situation for the individual, i.e. the situation existing on the reference date. The reference date is specific to each social micro-data collection (see the implementation guidelines for variable 'age in completed years').

Information on the person's 'country of birth' (i.e. whether the person is native- or foreign-born) needs to be known prior to the collection of information for the variable 'duration of stay in the country of residence in completed years', as different questions need to be asked for the native-born and for the foreign-born. If the information on the 'country of birth' is not available (i.e. 'not stated'), the same questions as for the 'native-born' should be asked.

The 'duration of stay in the country of residence in completed years' refers to the most recent arrival in the country of residence, that is, when the person last established his or her usual residence in the country, and not the year of first arrival in this country (i.e. the 'duration of stay in the country of residence in completed years' does not provide information on interrupted stays). In case of an interruption in the period of residence, the starting point should be the end of this interruption only if the length of this interruption was at least one year.

Reference question

Different questions need to be asked depending on whether a person was born in the country or not.

For native-born persons the following questions are recommended:

Did you ever live [have your usual residence] abroad for a period of at least 1 year? y/n

If yes: Considering the date you last arrived in this country (established your usual residence in this country) – for how many years have you lived in this country since then? *[please consider whole/completed years only]*

For foreign-born persons the following question is recommended:

Considering the date you last arrived in this country (established your usual residence in this country) – for how many years have you lived in this country since then? *[please consider whole/completed years only]*

Alternatively, the following question may be used:

In which date [year and month] did you last arrived in this country (established your usual residence in this country)? *[It is recommended to ask also for the month so that the calculation of the duration of stay can be more precise]*

It is to be noted that, regardless of the question used, information on the duration of stay in the country of residence should be transmitted to Eurostat in completed years.

(20) Region of residence

Name of the variable

Region of residence

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals or households

Filter None

Concept The region of residence is the region within the country of residence in which the person/household has his or her *usual residence*.

For Member States of the EU, regions are defined on the basis of the Nomenclature of territorial units for statistics (NUTS, in its French acronym) as described in Article 3 of Regulation (EC) No 1059/2003 of the European Parliament and the Council on the establishment of a common classification of territorial units for statistics (NUTS) (as amended)¹¹ and Annex I thereto.

For EFTA and Candidate countries, region refers to the classification of Statistical Regions¹², which applies principles similar to those used in the NUTS regulation.

Category concept

The region of residence is classified according to the categories set out by the Nomenclature of territorial units for statistics (NUTS) up to NUTS 3 level, see <http://ec.europa.eu/eurostat/web/nuts/overview>.

Categories for the variable

The level of detail needed is context-specific for each micro-data collection.

Region of residence	Level of detail		
	Low	Medium	High
NUTS 1 region	✓		
NUTS 2 region		✓	
NUTS 3 region			✓

Coding for data transmission should use the exact codes/labels as specified in Annex I of the NUTS regulation.

¹¹ See: <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32003R1059>

¹² See: <http://ec.europa.eu/eurostat/web/nuts/statistical-regions-outside-eu>

Implementation guidelines

Information on the region corresponding to the place of usual residence of a person or household is to be extracted from the list of NUTS regions in Annex I of the NUTS regulation. This list is amended not more frequently than every three years to reflect changes in the administrative units of the Member States¹³. Different versions of the NUTS classification are referred to as NUTS 2010, NUTS 2013 for example, reflecting the year in which the amendments were adopted.

Amendments to the NUTS come into effect as from the 1st of January of the second year after their adoption. For example, data with the reference date/period in 2015 is the first data to be transmitted in NUTS 2013.

The requirements for the transmission of historical series are set in the NUTS legislation.

Further information about the NUTS is available here: <http://ec.europa.eu/eurostat/web/nuts/overview>.

Information for the different micro-data collections will be transmitted to Eurostat as follows:

Micro-data collection	Level of detail		
	Low	Medium	High
EU-SILC		X	
EU-LFS			X
HBS		X	
AES		X	
EHIS		X	
HETUS		X	
ICT HH	X		

It is to be noted that the level of detail mentioned in this table only refers to data transmission to Eurostat. For most of the micro-data collections, this level of detail will only be used internally, mainly for the compilation of policy-relevant aggregations (coastal regions, metropolitan regions, etc.); data will be disseminated only at a more aggregated level (taking account of the rules for confidentiality and reliability).

¹³ It is to be noted that extraordinary amendments of the NUTS can happen "in the case of a substantial reorganisation of the relevant administrative structure of a Member State" (Art. 5 (4) NUTS Regulation).

(21) Degree of urbanisation

Name of the variable

Degree of urbanisation

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals or households

Filter None

Concept The variable reports on the degree of urbanisation of the area where the person or the household has his or her *usual residence*. The degree of urbanisation classifies local administrative units (LAU or communes) as cities, towns and suburbs, or rural areas based on the share of local population living in urban clusters and in urban centres.

Category concept

The variable classifies local administrative units into three types of area:

1. 'Cities' (alternative name: densely-populated areas): at least 50 % of the population lives in an urban centre.
2. 'Towns and suburbs' (alternative name: intermediate density areas): LAU level territorial units where at least 50% of the population live in urban clusters, but are not 'cities'.
3. 'Rural areas' (alternative name: thinly populated areas): more than 50 % of the population lives in rural grid cells.

This classification is based on a combination of criteria of geographical contiguity and minimum population threshold applied to 1 km² population grid cells.

The LAU list including the degree of urbanisation is published by Eurostat on the RAMON server: http://ec.europa.eu/eurostat/ramon/miscellaneous/index.cfm?TargetUrl=DSP_DEGURBA

For further methodological details on the classification of LAUs by degree of urbanisation, see <http://ec.europa.eu/eurostat/web/degree-of-urbanisation/methodology>.

Categories for the variable

Degree of urbanisation
Cities
Towns and suburbs
Rural areas

Implementation guidelines

Information on the degree of urbanisation corresponding to the area where the person or household has his/her *usual residence* is to be extracted from the LAU list including the degree of urbanisation. The list is published by Eurostat on the RAMON server. This classification takes into account the latest population grid and the LAU boundaries available, and it is subject to be maintained by Eurostat as new population grids or LAU boundaries are established.

Information on the degree of urbanisation should be obtained in accordance with the latest official version of the LAU list available on the 1st of January of the year of the reference date/period which applies to all quarters of that year.

For further information, see:

http://ec.europa.eu/regional_policy/sources/docgener/work/2014_01_new_urban.pdf

(22) Status in employment in main job

Name of the variable

Status in employment in main job

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Persons in employment¹⁴ (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable is based on the International Classification of Status in Employment (ICSE-93)¹⁵. The ICSE classifies jobs with respect to the type of (explicit or implicit) labour contract. Basic criteria underlying the classification and defining its groups are the type of economic risk including the strength of the attachment between the person and the job, and the type of authority over the establishments and other workers the incumbent has.

The variable refers to the main job of a person in employment.

The term job is used in reference to employment. One job is a set of tasks and duties performed for a single economic unit. Persons may have one or several jobs. For employees, each contract can be considered as a separate set of tasks and duties, and consequently as a separate job. Those in self-employment will have as many jobs as the economic units they own or co-own, irrespective of the number of clients served. In cases of multiple job-holding, the main job is that with the longest hours usually worked, as defined in the international statistical standards on working time.

Category concept

According to the basic criteria of economic risk and authority underlying ICSE and focussing on forms of employment relevant in the European context the following statuses are defined:

- *Self-employed persons with employees* are defined as persons who work in their own business, professional practice or farm for the purpose of earning a profit derived from the goods or services produced, and who employ at least one other person.
- *Self-employed persons without employees* are defined as persons who work in their own business, professional practice or farm for the purpose of earning a profit derived from the goods or services produced, and who do not employ any other person.
- *Employees* are defined as persons who work for a public or private employer based on a written or oral contract and who receive a payment in cash or in kind. This payment in cash

¹⁴ Information on whether a person is in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

¹⁵ The International Standard Classification on Status in Employment is currently being revised at ILO level. The variable will be revised once the revised classification is endorsed.

or in kind is not directly dependent upon the revenue of the unit for which they work. Members of the armed forces are also included if they are part of the survey target population. Employees normally work under direct supervision of, or according to guidelines set by the employing organisation or enterprise.

- *Family workers (unpaid)* are persons who help another member of the family to run a farm or other business, provided they are not considered as employees. Thus, they may not receive a kind of payment for their work in the family business because then they would be considered as employees.

The category 'not applicable' covers persons not in employment. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Status in employment in the main job
Self-employed person with employees
Self-employed person without employees
Employee
Family worker (unpaid)
Not stated
Not applicable

Implementation guidelines

There might be cases when the assignment to a status category is not always straightforward. Below are some examples to facilitate the assignment for particular cases.

Self-employed person

- A person who looks after one or more children who are not his/her own on a private basis and receives a payment for this service should be considered as self-employed, except when he/she works for a single employer and receives employment rights from that employer; in that case he/she should be considered as an employee.
- A freelancer should in general be classified as self-employed. However, in situations where a freelancer works for a single employer and receives employment rights from that employer (e.g. holiday pay) he/she should be classified as an employee.
- A person who gives private lessons should be considered as self-employed if he/she is directly paid by his/her students.
- Members of producers' co-operatives should be considered as self-employed. These members take part on an equal footing with other members in determining the organisation of production, work, sales and/or investments of the establishment.

Self-employed person without employees

- People who only engage members of his/her own family or trainees without payment should be classified in this category. This includes farmers just using the assistance of members of family.

- If a co-operative has employees (e.g. an accountant) the members of the co-operative should be considered as 'self-employed person without employees' because the co-operative, as an institution (and not any of its members) is the employer.

Employee

- A family member (son or daughter, for example), who is working in the family's farm and receives a regular monetary wage, is classified as an employee.
- A person looking after children of others in his/her own home is classified as an employee if he/she is paid to do this by the local authority (or any other public administration) and if he/she does not take any decision affecting the enterprise (e.g. schedules or number of children) but should be classified as self-employed if he/she does it privately.
- In case a co-operative has hired workers and these workers have an employment contract that gives them a basic remuneration (which is not directly dependent upon the revenue of the co-operative), these workers are identified as employees of the co-operative.
- Apprentices or trainees receiving remuneration should be considered as employees.
- Priests (of any kind of religion) are considered employees.
- On-call or casual workers are classified as employee or self-employed depending on the specific characteristic of their employment relationship. A prerequisite for being considered as a self-employed offering his/her work or services, respectively, is an own business or professional practice.

Family worker (unpaid)

- Relatives working in a family business or on a family farm without pay. This includes e.g. a son or daughter working in the parents' business or on the parents' farm without pay or a wife who assists her husband, or vice versa, in his/her business without receiving any pay.
- Helping family members do not have to live directly in the same household or on the same site. Also included are relatives living elsewhere but coming to help with the business, e.g. during the harvesting season, without pay in money or kind if the reference period lies within that season.
- If a relative receives any remuneration (including benefits in kind) the status in employment should be coded as 'employee'.

(23) Economic activity of the local unit for main job

Name of the variable

Economic activity of the local unit for main job

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Persons in employment¹⁶ (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable is defined according to the Statistical Classification of Economic Activities (Nomenclature statistique des activités économiques dans la Communauté européenne, NACE) Rev. 2. It determines the economic sector or kind of economic activity of the local unit in which the job of a person in employment is located.

The local unit is an enterprise or part thereof (e. g. a workshop, factory, warehouse, office, mine or depot) situated in a geographically identified place. At or from this place economic activity is carried out for which one or more persons work (even if only part-time) for one and the same enterprise (Council Regulation n°696/93).

The variable refers to the main job of a person in employment.

The term job is used in reference to employment. One job is a set of tasks and duties performed for a single economic unit. Persons may have one or several jobs. For employees, each contract can be considered as a separate set of tasks and duties, and consequently as a separate job. Those in self-employment will have as many jobs as the economic units they own or co-own, irrespective of the number of clients served. In cases of multiple job-holding, the main job is that with the longest hours usually worked, as defined in the international statistical standards on working time.

Category concept

The economic activity of the local unit is classified according to the categories set out by the NACE Rev. 2 up to a 3-digit level: <http://ec.europa.eu/eurostat/documents/1978984/6037342/Nace-Rev-2-3-digits-from-2008-onwards.pdf>

The category 'not applicable' covers persons not in employment. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

¹⁶ Information on whether a person is in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

Categories for the variable

The level of detail needed is context-specific for each micro-data collection.

Economic activity of the local unit for main job	Level of detail		
	Low	Medium	High
NACE Rev. 2 at 1-digit level	✓		
NACE Rev. 2 at 2-digit level		✓	
NACE Rev. 2 at 3-digit level			✓
Not stated	✓	✓	✓
Not applicable	✓	✓	✓

Implementation guidelines

There are mainly two possible approaches (questions) to identify the economic activity of the local unit. First, the respondent can be asked for the name and address of the firm where he/she has his/her main job, if this can be linked to a database of all firms in a country like a Statistical Business Register (SBR). In a second approach the respondent is asked to describe the economic activity and the kind of products or services supplied by the firm where he/she works.

Where the local unit has more than one economic activity, the dominant one should be recorded. The ideal measure for determining the dominant activity would be the number of employees for the different activities, rather than more economic concepts like added value or turnover.

If a person works in more than one place (transport, construction, maintenance, surveillance, itinerant work, etc.) or at home, or in the customer's place (e.g. for surveillance, security, cleaning), the local unit is taken to be the place from where instructions emanate or from where the work is organised.

The economic activity of the local unit for persons with a contract with a temporary employment agency should be coded as the activity of the local unit where they actually work and not in the industry of the agency which employs them.

Information for the different micro-data collections will be transmitted to Eurostat as follows:

Micro-data collection	Level of detail		
	Low	Medium	High
EU-SILC		X	
EU-LFS			X
HBS	X		
AES		X	
EHIS	X		
HETUS		X	
ICT HH	X		

(24) Occupation in main job

Name of the variable

Occupation in main job

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Persons in employment¹⁷ (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable is defined according to the International Standard Classification of Occupations, version 2008 (ISCO-08). It groups or classifies jobs according to the similarities of the tasks and duties undertaken in the job. In the International Labour Organization (ILO) resolution adopting the ISCO-08, occupation is defined as a set of jobs whose main tasks and duties are characterised by a high degree of similarity.

The variable refers to the main job of a person in employment.

The term job is used in reference to employment. One job is a set of tasks and duties performed for a single economic unit. Persons may have one or several jobs. For employees, each contract can be considered as a separate set of tasks and duties, and consequently as a separate job. Those in self-employment will have as many jobs as the economic units they own or co-own, irrespective of the number of clients served. In cases of multiple job-holding, the main job is that with the longest hours usually worked, as defined in the international statistical standards on working time.

Category concept

The occupation in main job is classified according to the categories set out by the ISCO-08 classification up to a 4-digit level: <http://ec.europa.eu/eurostat/documents/1978984/6037342/ISCO-08.pdf>

The category 'not applicable' covers persons not in employment. The category 'not applicable' also is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

¹⁷ Information on whether a person is in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

Categories for the variable

The level of detail needed is context-specific for each micro-data collection.

Occupation in main job	Level of detail	
	Low	High
ISCO-08 at 2-digit level	✓	
ISCO-08 at 4-digit level		✓
Not stated	✓	✓
Not applicable	✓	✓

Implementation guidelines

The essential information for determining the occupation is usually the job title of the person in employment and a description of the main tasks undertaken in the course of his/her duties.

If a person carries out two or more tasks for his/her employer which are so different from each other that they should have different ISCO codes, it is recommended to code it on the most extensive task.

Persons who carry out a period of training or apprenticeship based on an employment contract should be classified in the occupation corresponding to their employment contract.

Information for the different micro-data collections will be transmitted to Eurostat as follows:

Micro-data collection	Level of detail	
	Low	High
EU-SILC	X	
EU-LFS		X
HBS	X	
AES	X	
EHIS	X	
HETUS	X	
ICT HH	X	

(25) Self-perceived general health

Name of the variable

Self-perceived general health

Scope

The social micro-data collections EU-SILC, EU-LFS, EHIS, AES, HBS and HETUS

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The concept of self-perceived health is, by its very nature, subjective. The notion is restricted to an assessment coming from the individual and as far as possible not from anyone else, whether an interviewer, healthcare professional or relative.

Self-perceived health might be influenced by impressions or opinions from others, but is the result after these impressions have been processed by the individual relative to his/her own beliefs and attitudes.

The reference is to health in general rather than the present state of health, as the question is not intended to measure temporary health problems. It is expected to include the different dimensions of health, i.e. physical and emotional functioning, mental health (covering psychological well-being and mental disorders) and biomedical signs and symptoms. It omits any reference to age as respondents are not specifically asked to compare their health with others of the same age or with their own previous or future health state.

Category concept

Five answer categories are proposed. Two of them ('very good' and 'good') are at the upper end of the scale and other two ('bad' and 'very bad') are at the lower, while the intermediate category 'fair' represents a neutral position (i.e. neither good nor bad).

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Self-perceived general health
Very good
Good
Fair (neither good nor bad)
Bad
Very bad
Not stated
Not applicable

Implementation guidelines

The model question for the variable should not be filtered by any preceding question.

The intermediate category 'fair' should be translated into an appropriately neutral term as far as possible keeping in mind cultural interpretations in the various languages.

This variable is part of the Minimum European Health Module (MEHM), which was designed for a population aged 15 years old and over. The MEHM consists of two more variables on health status: long-standing health problem and limitation in activities because of health problems (also known as Global Activity Limitation Indicator - GALI). If the MEHM is implemented, all the questions should be asked in the recommended order (i.e. self-perceived general health, long-standing health problem, and limitation in activities because of health problems) and with no inclusion of any other health status related questions before or between the MEHM questions as it could have an impact on the results. The MEHM could be introduced to respondents using a short introduction: "I would now like to talk to you about your health".

In an interview mode, all possible answer categories should systematically be read to respondents.

Reference question

The reference question is recommended by the World Health Organization (WHO) and the wording is as follows: "How is your health in general? Is it... very good, good, fair, bad, very bad".

(26) Long-standing health problem

Name of the variable

Long-standing health problem

Scope

The social micro-data collections EU-SILC, EHIS, HBS and HETUS

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The concept of long-standing illnesses and long-standing health problems is subjective. The notion is restricted to an assessment coming from the individual and as far as possible not from anyone else, whether an interviewer, healthcare professional or relative.

Health problems cover different physical, emotional, behavioural and mental dimensions of health and besides diseases and disorders contain also for example pain, ill-health caused by accidents and injuries, congenital conditions.

The main characteristics of a **long-standing/chronic** condition are that it is permanent and may be expected to require a long period of supervision, observation or care. Longstanding illnesses or health problems should have lasted (or recurred) or are expected to last (recur) for 6 months or more; therefore temporary problems are not of interest.

Category concept

Two answer categories are proposed: 'yes' referring to the occurrence of one or more long-standing/chronic health problems and 'no' referring to the absence of any long-standing/chronic health problem as perceived by the respondent.

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Long-standing health problem
Yes
No
Not stated
Not applicable

Implementation guidelines

The model question for the variable should not be filtered by any preceding question.

This variable is part of the Minimum European Health Module (MEHM), which was designed for a population aged 15 years old and over. The MEHM consists of two more variables on health status: self-perceived general health and limitation in activities because of health problems (also known as Global Activity Limitation Indicator - GALI). If the MEHM is implemented, all the questions should be asked in the recommended order (i.e. self-perceived general health, long-standing health problem, and limitation in activities because of health problems) and with no inclusion of any other health status related questions before or between the MEHM questions as it could have an impact on the results. The MEHM could be introduced to respondents using a short introduction: “I would now like to talk to you about your health”.

As regards the implementation of the reference question (see section 'reference question'), it is necessary to keep in mind that the recommended wording allows for possible adaptations. For instance:

- ‘chronic’ or ‘long-standing’ should be chosen according to what is ‘best understood’ in a country/language.
- it is intended to ask if people ‘have’ a chronic condition, not if they really ‘suffer’ from it. However, the verb ‘suffer’ can be used in countries/languages where it is considered more suitable for the question formulation and still retains the same meaning as the verb ‘have’ in English.
- ‘health problem’ seems not to be understood in some countries/languages and therefore ‘illness or condition’ is the alternative.

The terms “disability, handicap, impairment” should not be included in the question as synonyms for “illness or health problem”.

Rather than adding further details to the question wording, interviewees should be instructed to be as inclusive as possible when considering the actual prevalence of a long-standing health problem. This means that the following could be considered as long-standing health problems (i.e. the corresponding answer category would be ‘yes’):

- problems that are seasonal or intermittent, even where they ‘flare up’ for less than six months at a time (for instance allergies);
- chronic problems not considered by the respondent as very serious; severity doesn't play a role in this variable;
- problems that have not been diagnosed by a doctor (to exclude these would mean permitting those with better access to medical services to declare more problems);
- a long-standing disease that doesn't bother the respondent and/or is kept under control with medication (for instance people with a high blood pressure);
- not only problems of ill-health or diseases but also pain as well as ill-health caused by accidents and injuries, congenital conditions, birth defects, etc.

Specification of the concepts presented above or stating concrete examples of diseases or chronic conditions in the question should be avoided.

Reference question

The reference question was proposed by Euro-REVES¹⁸ project and further possible adaptations agreed based on its pretesting in EHIS.

The wording of the reference question, including possible adaptations (see 'implementation guidelines'), is as follows: “Do you have any long-standing illness or [long-standing] health problem? Long-standing

¹⁸ More information can be found at: http://reves.site.ined.fr/en/home/regional_networks/euro_reves/

means illnesses or health problems which have lasted, or are expected to last, for 6 months or more. Yes / No”.

The original question proposed by Euro-REVES project did not use the second reference to long-standing (the expression in square brackets) neither used the second sentence clarifying the meaning of long-standing. However, pretesting in EHIS showed that they may be necessary to include in some languages. As most countries implementing EHIS used the second sentence either as a part of the question or as a part of the additional explanations, the sentence is proposed to be used as the standard in order to ensure more harmonisation. The second reference to long-standing is optional.

(27) Limitation in activities because of health problems

Name of the variable

Limitation in activities because of health problems (Global Activity Limitation Indicator - GALI)

Scope

All social micro-data collections concerning households/persons (EU-SILC, EU-LFS, HBS, AES, EHIS, HETUS and ICT HH)

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable reports on participation restriction through long-standing limitation (6 months or more) in activities that people usually do because of health problems, and its severity.

It measures the respondent's self-assessment of whether he/she is limited (in "activities people usually do") by any on-going physical, mental or emotional health problem, including disease or impairment, and old age. Consequences of injuries/accidents, congenital conditions, etc., are all included. Only the limitations directly caused by or related to one or more **health problems** are considered. Limitations due to financial, cultural or other none health-related causes should not be taken into account.

An **activity** is defined as: 'the performance of a task or action by an individual' and thus activity limitations are defined as 'the difficulties the individual experiences in performing an activity'. People with long-standing limitations due to health problems have passed through a process of adaptation which may have resulted in a reduction of their activities. To be able to identify existing limitations a reference is necessary and therefore the activity limitations are assessed against a generally accepted population standard, relative to cultural and social expectations by referring only to '**activities people usually do**'. Usual activities cover all spectrums of activities: work or school, home and leisure activities.

The purpose of the variable is to measure the presence of **long-standing** limitations, as the consequences of such long-standing limitations (e.g. care, dependency) are more serious. Temporary or short-term limitations are excluded.

The **period of at least the past 6 months** is strictly related to the duration of the activity limitation and not to the duration of the health problem. The limitations must have started at least six months earlier and still exist at the moment of the interview. This means that a positive answer ('severely limited' or 'limited but not severely') should be recorded only if the person is currently limited and has been limited in activities for at least the past 6 months.

New limitations which have not yet lasted 6 months but are expected to continue for more than 6 months shall not be taken into consideration, even if usual medical knowledge would suggest that the health problem behind a new limitation is very likely to continue for a long time or for the rest of the life of the respondent (such as for diabetes type 1). One reason is that in terms of activity limitation it may be possible to

counteract at some point negative consequences for activity limitations by using assisting devices or personal assistance. The activity limitations of the same health problem may also depend on the individual person and circumstances, and only past experience can provide a safe answer.

This variable can be used as a proxy for disability.

Category concept

The response categories include three levels to better differentiate the severity of activity limitations: severely limited (severe limitations), limited but not severely (moderate limitations), not limited at all (no limitations).

'Severely limited' means that performing or accomplishing an activity cannot be done or only done with extreme difficulty, and that this situation has been ongoing for at least the past 6 months. Persons in this category usually cannot do the activity alone and would need further help from other people.

'Limited but not severely' means that performing or accomplishing a usual activity can be done but only with some difficulties, and that this situation has been ongoing for at least the past 6 months. Persons in this category usually do not need help from other persons. When help is provided it is usually less often than daily.

Persons with recurring or fluctuating health conditions should refer to the most common (most frequent) situation impacting their usual activities. People with conditions where several activity domains are affected but to different extent (less impact in some domains but more impact in some other domains) should make an overall evaluation of their situation and prioritize more common activities.

'Not limited at all' means that performing or accomplishing usual activities can be done without any difficulties, or that any possible activity limitation has NOT been going on for at least the past 6 months (i.e. it is not a long-standing limitation).

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Limitation in activities because of health problems
Severely limited
Limited but not severely
Not limited at all
Not stated
Not applicable

Implementation guidelines

The questions corresponding to the variable should not be filtered by any preceding question.

This variable is part of the Minimum European Health Module (MEHM), which was designed for a population aged 15 years old and over. The MEHM consists of two more variables on health status: self-perceived general health and long-standing health problem. If the MEHM is implemented, all the

questions should be asked in the recommended order (i.e. self-perceived general health, long-standing health problem, and limitation in activities because of health problems) and with no inclusion of any other health status related questions before or between the MEHM questions as it could have impact on results. The MEHM, or a part of it, could be introduced to respondents using a short introduction: "I would now like to talk to you about your health".

The question should clearly show that the reference is to the activities people usually do and not to respondent's 'own activities'. Neither a list with examples of activities (for example work or school, home or leisure activities) nor a reference to the age group of the subject is included in the question. As such it gives no restrictions by culture, age, gender or the subjects own ambition. Specification of health concepts (e.g. physical and mental health) should be avoided.

In an interview mode, all possible answer categories should systematically be read to respondents. Information on 'limitation in activities because of health problems' is to be collected through two questions (see section 'reference question'). However, the data should always be transmitted to Eurostat as one single variable. The final variable for data transmission is constructed as follows:

- TRANSMITTED_VARIABLE_CATEGORY = 'severely limited' if QUESTION_1 = 'severely limited' and QUESTION_2 = 'Yes'
- TRANSMITTED_VARIABLE_CATEGORY = 'limited but not severely' if QUESTION_1 = 'limited but not severely' and QUESTION_2 = 'Yes'
- TRANSMITTED_VARIABLE_CATEGORY = 'not limited at all' if QUESTION_1 = 'not limited at all' or QUESTION_2 = 'No'
- TRANSMITTED_VARIABLE_CATEGORY = 'not stated' if QUESTION_1 is missing or [(QUESTION_1 = 'severely limited' or 'limited but not severely') and (QUESTION_2 is missing)]

Reference question

The reference question was originally developed as a single-question instrument by the Euro-REVES¹⁹ project. This single-question version was implemented in EU-SILC and EHIS. However, following concerns about the length and complexity of the single-question version (four concepts in one question) and experience with its implementation, several studies aiming at simplifying and improving GALI were carried out. This led to the development of a routed, two-question version. This routed version aims at making GALI better and easier to understand for respondents, in particular in telephone interviews and self-administered questionnaires. The routed version is to be implemented in all EU social micro-data collections concerned.

The recommended two-question instrument is as follows:

QUESTION_1: "Are you limited because of a health problem in activities people usually do? Would you say you are... severely limited, limited but not severely, or not limited at all?"

If answer to QUESTION_1 is 'severely limited' or 'limited but not severely' ask QUESTION_2:

QUESTION_2: "Have you been limited for at least the past 6 months? Yes, No".

¹⁹ More information can be found at: http://reves.site.ined.fr/en/home/regional_networks/euro_reves/

(28) Net current monthly household income

Name of the variable

Net current monthly household income

Scope

The social micro-data collections HBS, AES, EHIS, HETUS and ICT HH

Variable definition

Reporting unit Households

Filter None

Concept The variable reports on the net current monthly income of a private household, i.e. the sum of the income of all household members received individually or as a whole –including income from work, social benefits, and other cash income components, and deducting cash transfers paid to other households– after taxes and contributions to social insurance, corresponding to the monthly average. The variable aims at providing information on the household income remaining available to be spent or saved.

Category concept

The variable can be described at two possible levels of detail. The level of detail needed is context specific for each micro-data collection.

At a higher level of detail, the variable provides information on the 'total net current monthly household income' in the national currency.

At a lower level of detail, the variable provides information on equivalised income. And, it differentiates between five possible income categories depending on the equivalised net current monthly income level of the household²⁰. Equivalisation consists of applying weights (equivalence values) to the household members to reflect differences in needs for households of different size or composition. The OECD-modified equivalence scale is to be used, i.e. a weight of 1.0 is applied to the first member of the household aged 14 or more, 0.5 to the second and each subsequent member aged 14 or over, and 0.3 to each child aged less than 14.

²⁰ At a higher level of detail, in contrast, information on exact income figures is to be transmitted to Eurostat, and therefore in that case the equivalised income can be calculated by Eurostat.

The thresholds between the five categories are determined by the four cut-off values (quintiles) that allow dividing the variable distribution (of equivalised net current monthly income) into five groups represented by 20% of households each²¹. The categories are defined as follows:

'Lower equivalised net current monthly income group' corresponds to households with an equivalised income level that falls below the first quintile, i.e. among the 20% lowest incomes observed in the distribution.

'Low to medium equivalised net current monthly income group' corresponds to households with an equivalised income level equal or greater than the first quintile and below the second quintile, i.e. among the 40% lowest incomes but not among the 20% lowest in the distribution.

'Medium equivalised net current monthly income group' corresponds to households with an equivalised income level equal or greater than the second quintile and below third quintile, i.e. among the 60% lowest incomes but not among the 40% lowest in the distribution.

'Medium to high equivalised net current monthly income group' corresponds to households with an equivalised income level equal or greater than the third quintile and below the fourth quintile, i.e. among the 80% lowest incomes but not among the 60% lowest in the distribution.

'Higher equivalised net current monthly income group' corresponds to households with an equivalised income level equal or greater than the fourth quintile, i.e. among the 20% highest incomes observed in the distribution.

Categories for the variable

The level of detail needed is context specific for each micro-data collection.

Net current monthly household income	Level of detail	
	Low	High
Lower equivalised net current monthly income group	✓	
Low to medium equivalised net current monthly income group	✓	
Medium equivalised net current monthly income group	✓	
Medium to high equivalised net current monthly income group	✓	
Higher equivalised net current monthly income group	✓	
Total net current monthly household income (in national currency)		✓
Not stated	✓	✓

Implementation guidelines

The 'net current monthly household income' is the result of adding up the net current income, corresponding to the monthly average, from all members of the household received

²¹ It is to be noted that the five income categories might not always represent exactly (but only approximately) one fifth of the distribution each, e.g. in cases where the information has been mainly collected in income bands.

individually or as a whole. The variable should aim at including the following income components:

- 'Income from work' or employment income, which covers 'employee income' and 'self-employment income'. 'Employee income' refers to the monthly 'take-home' pay of employees, i.e. they pay after deducting income taxes, employee's social security contributions and voluntary contributions; additional payments such as overtime pay, productivity bonus, etc., should be taken into consideration on a monthly basis. 'Self-employment income' refers to the income received by individuals as a result of their involvement in self-employment work; as self-employment income may be difficult to measure, an estimate of the net monthly income from this source may be provided.
- 'Income from social benefits' covers social transfers (in cash) including unemployment benefits, old age and survivor benefits, sickness and disability benefits, education related allowances, family/children related allowances, housing allowances, and social exclusion allowances not classified elsewhere.
- 'Other cash income components' covers income from capital and investments (property, assets, savings, stocks, shares, private pension plans, etc.), regular inter-household cash transfers received (e.g. alimony or child support payments), or any other household cash income which was not allocated to any of the above categories.

The 'net current monthly household income' is after deducting regular cash transfers paid to other households (e.g. alimony or child support payments).

All the income components to be included (or deducted) for the calculation of 'net current monthly household income' need to be enumerated to the respondent to ensure that the necessary information is provided. The information on income provided should be net of any amounts deducted at the source for tax and contributions for social insurance and pensions, for all the income components. In case the household income varies significantly due to annual tax declaration or tax reimbursements, an average monthly amount should be included to/deducted from the declared net monthly income.

The 'net current monthly household income' refers to cash income (money income) only. It does not include income in kind (i.e. income other than money income, such as employee benefits or government-provided goods and services), imputed rent, or income from household production of goods or services for own consumption.

Information for the different micro-data collections will be transmitted to Eurostat as follows:

Micro-data collection	Level of detail	
	Low	High
HBS		X
AES	X	
EHIS	X	

HETUS	X	
ICT HH	X	

Information on net current monthly household income should be collected in exact figures as first option or otherwise in income bands as second option. The (monthly) income bands provided to the respondents should be based on a national income distribution from a statistical source measuring net household income (e.g. EU-SILC²²), and provide an appropriate coverage of such distribution. It is recommended considering 15 or more income bands as good practice, or in any case no fewer than 10²³.

For HBS (providing information at a higher level of detail) in the cases where the information has been collected in income bands, it needs to be imputed into exact income figures before data transmission.

For AES, EHIS, HETUS and ICT HH the information collected on net current monthly household income needs to be equivalised, i.e. divided by the equivalent household size according to OECD- modified scale (see section 'category concept'), for which the household size and the number of household members aged less than 14 need to be known²⁴. Then, the quintiles of the equivalised net current monthly income distribution from the data collected are determined, and each household is classified in the appropriate variable category according to its equivalised net current monthly income level (see section 'category concept').

The variable refers to the total (net) current income from all members of the household corresponding to the monthly average. The respondent may be given the possibility of consulting other members of the household in order to provide an accurate response, if necessary. The month of the date of the first interview may be taken as reference, or alternatively the previous month as a possible way to ease the data collection, e.g. in case this facilitates the calculation of household income to the respondent. If the household income varies greatly from month to month an estimation of the typical/usual net monthly income reflecting the current household income situation is to be provided. In case the monthly household income varies substantially over the year (in case of seasonal activity, dividends/bonuses, or other sources of irregular income) the monthly average of the annual income is to be considered, i.e. an estimation of the annual income corresponding to that income component or source of income divided by twelve.

In case the information is extracted from administrative data and –for one or more of the income components– it is available on gross income, the information on net income corresponding to the income components should be calculated by subtracting taxes and social security contributions, in line with the variable definition. The information extracted from

²² See EU-SILC variable 'total disposable household income'.

²³ Tests have shown that the current monthly household income might be significantly underreported compared income collected in the framework of the EU-SILC. It is advisable to provide denser income bands, especially for the lower end of the income grill, in order to avoid overrepresentation of the lower quintiles of this variable.

²⁴ See standardised variable 'household size'.

administrative data should correspond to the most up-to-date information available at the time of data transmission to Eurostat, in order to reflect the current household income situation.

Reference question

The reference question for the variable consists of two parts. First, the respondent is asked to provide an actual net current monthly household income value. All the income components need to be enumerated, either in separate questions or as part of the same question (see example below):

"Please take into account all sources of cash (money) income of all household members: Income from work (employment and self-employment), social benefits, and other sources of cash income (e.g. from capital and investments or inter-household cash transfers received).

What is the [net] monthly [cash/money] income of your household after deduction of taxes and contributions to social security and pensions (deducting cash transfers paid to other households, e.g. alimony or child support payments)? If income varies between months, please give a monthly average." *[Exact figure to be provided]*

Second, in case of nonresponse (i.e. respondent not able or willing to provide an exact value) the respondent is asked to provide an approximate income range. The cut-off values between income bands should be presented in the national currency. It is recommended considering 15 or more income bands as good practice, or in any case no fewer than 10 (see example below).

"If you do not know the exact amount, could you estimate which of the following intervals best represents the total net monthly income of your household?

- 0 to under [1st cut-off value]
- [1st cut-off value] to under [2nd cut-off value]
- [2nd cut-off value] to under [3rd cut-off value]
- [3rd cut-off value] to under [4th cut-off value]
- [4th cut-off value] to under [5th cut-off value]
- [5th cut-off value] to under [6th cut-off value]
- [6th cut-off value] to under [7th cut-off value]
- [7th cut-off value] to under [8th cut-off value]
- [8th cut-off value] to under [9th cut-off value]
- [9th cut-off value] to under [10th cut-off value]
- [10th cut-off value] to under [11th cut-off value]
- [11th cut-off value] to under [12th cut-off value]
- [12th cut-off value] to under [13th cut-off value]
- [13th cut-off value] to under [14th cut-off value]
- [14th cut-off value] or above
- Not stated."

(29) Existence of previous employment experience

Name of the variable

Existence of previous employment experience

Scope

The social micro-data collections EU-SILC and EU-LFS

Variable definition

Reporting unit Individuals

Filter Persons not in employment²⁵ (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable provides information on whether a person without employment has previously been in employment, and on whether the previous employment experience was or not limited to purely occasional work. For the purpose of this variable, occasional work refers to a job without the features of continuity and job security; it is defined as a job that lasted less than three months (whatever the job is part-time or full-time, formal or informal) and had only one spell in time.

Category concept

The category 'person has never been in employment' covers persons who have never had employment experience, in accordance with the International Labour Organisation (ILO) definition of employment²⁶ (i.e. those who have never had employment experience in an employment for pay or profit, with at least one hour of work per week). This category should also be used for persons currently not in employment but who only had a previous employment experience as a conscript (compulsory military or civilian service).

The category 'person has employment experience limited to occasional work' covers persons who have had employment experience, according to the International Labour Organisation (ILO) definition of employment (i.e. those with a previous employment experience in an employment for pay or profit, with at least one hour of work per week), and this experience is limited to occasional work.

The category 'person has employment experience other than occasional work' covers persons who have had employment experience, according to the International Labour Organisation (ILO) definition of employment (i.e. those with a previous employment experience in an

²⁵ Information on whether a person is or not in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

²⁶ See 19th ICLS resolution concerning statistics of work, employment and labour underutilization http://www.ilo.org/global/statistics-and-databases/standards-and-guidelines/resolutions-adopted-by-international-conferences-of-labour-statisticians/WCMS_230304/lang--en/index.htm

employment for pay or profit, with at least one hour of work per week), excluding those cases where this experience is limited to occasional work or as a conscript.

The category 'not applicable' covers persons in employment. This category is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Existence of previous employment experience
Person has never been in employment
Person has employment experience limited to occasional work
Person has employment experience other than occasional work
Not stated
Not applicable

Implementation guidelines

Employment is defined in the 19th ICLS resolution concerning statistics of work, employment and labour underutilization. The previous employment experience should be an employment for pay or profit, with at least one hour of work per week.²⁷

A person who only had work experiences not in line with the employment definition in the 19th ICLS resolution (e.g. unpaid work or unpaid traineeships) should be coded as having no employment experience.

Unpaid family work is considered as employment according to the 19th ICLS resolution and should be treated as employment experience.²⁸

Work as a conscript should not be considered as employment experience for this variable.

Seasonal workers working less than three months but for several consecutive years should be considered as having employment experience other than occasional work. On the opposite, persons who only did vacation work which lasted less than 3 months and occurred only one year should be considered as has having employment experience limited to occasional work.

Sporadic or vacation jobs that the person may have engaged in while still in school or university are to be considered as occasional work. However, in the case of a student who has been continuously performing paid work alongside with studies, that experience should be considered as previous employment experience other than occasional work, even if the amount of hours was limited (e.g. a student working few hours every weekend during the school-year).

²⁷ People absent from employment during the reference period and classified as not employed according to the 19th ICLS resolution, can be directly coded as having previous employment experience. In this case, all the variables of the topic “previous work experience” are to be referred to the job/business they are absent from.

²⁸ The category ‘unpaid family work’ is defined under variable 22 ‘Status in employment in main job’ of this document.

(30) Size of the local unit for main job

Name of the variable

Size of the local unit for main job

Scope

The social micro-data collections EU-SILC, EU-LFS, and AES

Variable definition

Reporting unit Individuals

Filter Persons in employment²⁹ (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable reports on the number of persons working for the local unit including those working at the unit's location, as well as those who work outside and organisationally belong to it and on the payroll for that unit (e.g. sales representatives, delivery personnel or repair and maintenance teams). It also includes working proprietors, partners working regularly in the unit and unpaid family workers, as well as part-time workers who are regarded as such under the laws of the country concerned and who are on the payroll. Seasonal workers, apprentices, trainees and home workers on the payroll are also included.

The local unit is an enterprise or part thereof (e.g. a workshop, factory, warehouse, office, mine or depot) situated in a geographically identified place. At or from this place economic activity is carried out for which one or more persons work (even if only part-time) for one and the same enterprise (Council Regulation n°696/93).

The variable refers to the main job of a person in employment.

The term job is used in reference to employment. One job is a set of tasks and duties performed for a single economic unit. Persons may have one or several jobs. For employees, each contract can be considered as a separate set of tasks and duties, and consequently as a separate job. Those in self-employment will have as many jobs as the economic units they own or co-own, irrespective of the number of clients served. In cases of multiple job-holding, the main job is that with the longest hours usually worked, as defined in the international statistical standards on working time.

²⁹ Information on whether a person is in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

Category concept

The categories for the variable allow for either an exact number of workers to be indicated for units with 9 persons or less, broader categories for units with 10 or more persons, or simply an indication on whether the size of the local unit is less than 10 persons or 10 persons or more.

The category 'not applicable' covers persons not in employment. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Size of the local unit for main job
Exact number of persons, if between 1 and 9
10 to 19 persons
20 to 49 persons
50 to 249 persons
250 persons or more
Do not know but less than 10 persons
Do not know but 10 persons or more
Not stated
Not applicable

Implementation guidelines

The interviewed person should be included in the number of persons working for the local unit. Those temporarily absent (e.g. on sick leave, paid or special leave, or on strike) should also be counted as far as they are on the payroll, but those absent for an indefinite period should not be counted.

This variable should reflect the current situation.

The respondent should provide information on the exact number of workers for units with 9 persons or less, or the most appropriate category for units of 10 or more persons. Only in case the respondent is not able to provide a more precise value the option of simply indicating whether the size of the unit is less than 10 persons or 10 persons or more may be allowed.

The number of persons working for the local unit should exclude manpower occasionally supplied to the unit by other enterprises, including those carrying out repair and maintenance work in the enquiry unit on behalf of other enterprises. People performing activities that are subcontracted to another enterprise, such as cleaning or catering should be excluded even if regularly working in the local unit. However, if the workers are supplied to the unit on a regular basis to perform activities related to the core business of the unit (e.g. those working for a temporary employment agency) they should be counted. Similarly, an interviewed person working for a temporary employment agency should provide the number of persons working for the local unit where he/she performs his/her work.

In case of self-employed persons without employees, the question should also be asked (it should include for example colleagues working in the same local unit as employees or as unpaid family workers).

In situations where the interviewed person is sharing the workplace with one-person companies or with workers on the payrolls of different companies (e.g. co-working space) other workers in the workplace should not be counted as far as they are not on the payroll of the same company.

Persons working for a temporary employment agency should provide the numbers of persons working in the local unit where they actually perform their work and not refer to the temporary employment agency. This applies, for example, to *interimaire* or *intramuros* working arrangement.

(31) Supervisory responsibilities in main job

Name of the variable

Supervisory responsibilities in main job

Scope

The social micro-data collections EU-SILC and EU-LFS

Variable definition

Reporting unit Individuals

Filter Persons in employment³⁰ who are employees (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable allows distinguishing between employees with and without supervisory tasks. A person is considered to have supervisory responsibilities when he/she formally supervises the work of at least one (other) person. Supervision means that he or she takes charge of the work of other employees, directs their work and sees that is satisfactorily carried out. Corresponding responsibilities toward apprentices and trainees do not count as supervision. Neither does mere quality control (check output of services but not the work produced by other persons) or consultancy.

The variable refers to the main job of a person in employment who is an employee.

The term job is used in reference to employment. One job is a set of tasks and duties performed for a single economic unit. Persons may have one or several jobs. For employees, each contract can be considered as a separate set of tasks and duties, and consequently as a separate job.

Category concept

The response categories are 'yes' and 'no'. They inform on whether an employee has or has not supervisory responsibilities in the main job.

The category 'not applicable' covers persons not in employment and persons in employment who are not employees. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

³⁰ Information on whether a person is in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

Categories for the variable

Supervisory responsibilities in main job
Yes
No
Not stated
Not applicable

Implementation guidelines

Supervisory responsibilities include formal responsibilities for directing other employees normally of the same organisational unit, i.e. for supervising a group of other employees (other than apprentices and trainees), whom the respondent supervises directly, sometimes when doing some of the work that he or she supervises. It implies that the supervisor or foreman takes charge of the work, directs the work and sees that it is properly conducted.

The usual situation should be considered (and not the situation during the reference period only). Persons having supervisory responsibilities only because they are temporarily replacing an absent superior should not be considered as having supervisory responsibilities. The definition 'temporarily' here is left to the respondent.

In combination with information on 'occupation in main job' and 'status in employment in main job' the variable helps in identifying different categories of workers, which can be useful for various analytical purposes (e.g. to monitor gender equality and equal opportunities, or as an indicator of career progression).

Job titles may sometimes be misleading. For example, a 'playground supervisor' supervises children not employees and should be counted an employee without supervisory responsibilities (answering category 'no'). Similarly, a 'store manager' may be a storekeeper and not a supervisor of employees, in which case he/she should be considered as an employee without supervisory responsibilities. Only people supervising the work of at least one (other) person, should be coded 1.

In some cases the person is cumulating supervising responsibilities with other functions; even if the supervising responsibilities only constitute a part of their job, they should be considered as employees with supervisory responsibilities (answering category 'yes').

Members of groups with collective responsibility (groups where there is a rotating leadership in a continuous way taking charge of the work of other employees, directing their work and seeing that is satisfactorily carried out) should be considered as having supervisory responsibilities.

This variable should reflect the current situation.

(32) Year in which the person started working for his or her current employer or as self-employed in current main job

Name of the variable

Year in which the person started working for current employer or as self-employed in main job

Scope

The social micro-data collections EU-LFS and AES

Variable definition

Reporting unit Individuals

Filter Persons in employment³¹ (and who are in the survey target population). The definition of employment and corresponding filters for follow-up variables can vary between data sources.

Concept The variable reports on the year in which the person started to work for his or her current employer or as self-employed in the current business.

The variable refers to the current main job of a person in employment.

The term job is used in reference to employment. One job is a set of tasks and duties performed for a single economic unit. Persons may have one or several jobs. For employees, each contract can be considered as a separate set of tasks and duties, and consequently as a separate job. Those in self-employment will have as many jobs as the economic units they own or co-own, irrespective of the number of clients served. In cases of multiple job-holding, the main job is that with the longest hours usually worked, as defined in the international statistical standards on working time.

Category concept

Year in which the person started working for current employer or as self-employed in main job (expressed in four digits).

The category 'not applicable' covers persons not in employment. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

³¹ Information on whether a person is in employment is determined by the ILO definition in the case of EU-LFS, and by the self-defined main activity status for the rest of micro-data collections.

Categories for the variable

Year in which the person started working for current employer or as self-employed in current main job
--

Year in which the person started working for current employer or as self-employed in current main job (4 digits)
--

Not stated

Not applicable

Implementation guidelines

In case of renewed contracts (e.g. if respondent has a contract that is renewed, for example yearly) without interruption, the year considered should be that of the first contract. Also, if, at the end of the contract, the renewal is already agreed and the total duration of the interruption is less than three months, this should be considered as renewal (and not as a separate spell).

In case of *separate spells* (periods) of employment for employees, any previous employment spells with the same employer but with an interruption of the contract of more than three months should be ignored, and the year in which the person started the most recent spell should be recorded (e.g. for seasonal workers).

If an employee changes the department, job or occupation within one company and gets a new contract, the year in which he/she started to work for the employer (i.e. before the change) should be indicated (and not the year corresponding to the new contract). Even if an employee changes the characteristics of the job with the same employer, for instance from temporary to permanent, part-time or full-time, or has a career progression, the date of starting to work for the employer (i.e. before the change) should be indicated.

If the employee's company or firm changed ownership, but his or her conditions of employment did not change, it should be treated as one continuous period of employment. However, if the respondent was made redundant and then re-employed by the new owners (even if the interruption is less than 3 months, the year in which he/she was re-employed should be entered.

For teachers signing every year annual contracts with the same employer (the Education Ministry) and having an interruption period during the summer holidays, the year they started being teacher within the public education system should be recorded. Similarly, for people working in public administration, the year they started working in public administration, whatever the administration, service and contract type is to be recorded.. Nevertheless, a change of administration level, i.e. from central to regional or local level or vice-versa, can be considered as a change of employer according to national specificities.

For self-employed persons, the length of time the respondent has been continuously self-employed in his/her current main job is relevant. For example, a change in the portfolio of the current business is not considered as interruption.

Respondents employed by *temporary employment agencies* should provide the year in which they last started working for this employment agency, regardless of whether they have been working in the same or different local units during this time (and despite the fact that for

workers employed by temporary employment agencies the branch of their economic activity³² should, in contrast, be based on the current local unit).

Employees who have been *seconded to another organisation* (public or private) should be treated as having no break in employment if their contract with the original employer is not discontinued. If the respondent worked temporarily in another organisation and was formally employed by that (new) employer, there is a discontinuation in the employment relationship. Then the variable should relate to the time when the respondent started to work again for the current employer.

³² See variable 'economic activity of the local unit for main job'.

(33) Year when the highest level of education was successfully completed

Name of the variable

Year when the highest level of education was successfully completed

Scope

The social micro-data collections EU-SILC, EU-LFS, and AES

Variable definition

Reporting unit Individuals

Filter Persons with educational attainment level of ISCED 1 or above. Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The variable refers to the year when the highest level of education was successfully completed.

Category concept

Year when the highest level of education was successfully completed (expressed in four digits).

The category 'not applicable' covers individuals with no formal education or an educational attainment level below ISCED 1. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

Year when the highest level of education was successfully completed
Year when the highest level of education was successfully completed (4 digits)
Not stated
Not applicable

Implementation guidelines

The 'year when the highest level of education was successfully completed' refers to the educational attainment as reported in variable 'educational attainment level', and its implementation guidelines apply accordingly.

In case the respondent does not know the exact date (e.g. in case of a proxy respondent), an estimation should be provided. One possible way to estimate 'year when the highest level of education was successfully completed' is based on the year of birth and the age at completion

of the highest level of education or, if unknown, the usual duration (without interruption) for a particular level of educational attainment.

Reference question

The question should ask about the year when the highest level of education was successfully completed [educational attainment level]. It should be aligned with the question(s) used to ask about educational attainment, see reference question for variable 'educational attainment level'.

Auxiliary questions on the age of the respondent when completing the highest level of education or how many years ago the highest level of education was completed should be asked to allow an estimation if the respondent does not remember the year.

(34) Field of the highest level of education successfully completed

Name of the variable

Field of the highest level of education successfully completed

Scope

The social micro-data collections EU-LFS and AES

Variable definition

Reporting unit Individuals

Filter Persons with educational attainment level of ISCED 3 or above. Specific filters (e.g. aged 15+) may apply depending on the survey target population concerning the variable.

Concept The field of the highest level of education successfully completed is based on 'ISCED Fields of Education and Training' (ISCED-F 2013) which classifies education programmes and related qualifications by fields of study. A field is the 'broad domain, branch or area of content covered by an education programme or qualification'.

Category concept

The field of the highest level of education successfully completed is defined according to the 'ISCED Fields of Education and Training' (ISCED-F 2013, see <http://uis.unesco.org/sites/default/files/documents/isced-fields-of-education-and-training-2013-en.pdf>).

The variable can be described at two possible levels of detail. The high level of detail refers to ISCED-F 2013 narrow fields (2nd level of the classification). The low level of detail refers to ISCED-F 2013 broad fields (1st level of the classification). The level of detail needed is context specific for each micro-data collection.

The category 'not applicable' covers individuals with no formal education or an educational attainment level below ISCED 3. The category 'not applicable' is also to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age).

Categories for the variable

The level of detail needed is context-specific for each micro-data collection.

Field of the highest level of education successfully completed	ISCED-F 2013 codes ¹	Level of detail ²	
		L	H
Generic programmes and qualifications	00	✓	
<i>Basic programmes and qualifications</i>	001		✓
<i>Literacy and numeracy</i>	002		✓
<i>Personal skills and development</i>	003		✓
<i>Generic programmes and qualifications not further defined</i>	(009)		✓
Education	01	✓	
<i>Education</i>	011		✓
<i>Inter-disciplinary programmes and qualifications involving education</i>	018		✓
Arts and humanities	02	✓	
<i>Arts</i>	021		✓
<i>Humanities (except languages)</i>	022		✓
<i>Languages</i>	023		✓
<i>Inter-disciplinary programmes and qualifications involving arts and humanities</i>	028		✓
<i>Arts and humanities not further defined</i>	(029)		✓
Social sciences, journalism and information	03	✓	
<i>Social and behavioural sciences</i>	031		✓
<i>Journalism and information</i>	032		✓
<i>Inter-disciplinary programmes and qualifications involving social sciences, journalism and information</i>	038		✓
<i>Social sciences, journalism and information not further defined</i>	(039)		✓
Business, administration and law	04	✓	
<i>Business and administration</i>	041		✓
<i>Law</i>	042		✓
<i>Inter-disciplinary programmes and qualifications involving business, administration and law</i>	048		✓
<i>Business, administration and law not further defined</i>	(049)		✓
Natural sciences, mathematics and statistics	05	✓	
<i>Biological and related sciences</i>	051		✓
<i>Environment</i>	052		✓
<i>Physical sciences</i>	053		✓
<i>Mathematics and statistics</i>	054		✓
<i>Inter-disciplinary programmes and qualifications involving natural sciences, mathematics and statistics</i>	058		✓
<i>Natural sciences, mathematics and statistics not further defined</i>	(059)		✓
Information and Communication Technologies (ICTs)	06	✓	
<i>Information and Communication Technologies</i>	061		✓

Field of the highest level of education successfully completed	ISCED-F 2013 codes ¹	Level of detail ²	
		L	H
<i>Inter-disciplinary programmes and qualifications involving Information and Communication Technologies (ICTs)</i>	068		✓
Engineering, manufacturing and construction	07	✓	
<i>Engineering and engineering trades</i>	071		✓
<i>Manufacturing and processing</i>	072		✓
<i>Architecture and construction</i>	073		✓
<i>Inter-disciplinary programmes and qualifications involving engineering, manufacturing and construction</i>	078		✓
<i>Engineering, manufacturing and construction not further defined</i>	(079)		✓
Agriculture, forestry, fisheries and veterinary	08	✓	
<i>Agriculture</i>	081		✓
<i>Forestry</i>	082		✓
<i>Fisheries</i>	083		✓
<i>Veterinary</i>	084		✓
<i>Inter-disciplinary programmes and qualifications involving agriculture, forestry, fisheries and veterinary</i>	088		✓
<i>Agriculture, forestry, fisheries and veterinary not further defined</i>	(089)		✓
Health and welfare	09	✓	
<i>Health</i>	091		✓
<i>Welfare</i>	092		✓
<i>Inter-disciplinary programmes and qualifications involving health and welfare</i>	098		✓
<i>Health and welfare not further defined</i>	(099)		✓
Services	10	✓	
<i>Personal services</i>	101		✓
<i>Hygiene and occupational health services</i>	102		✓
<i>Security services</i>	103		✓
<i>Transport services</i>	104		✓
<i>Inter-disciplinary programmes and qualifications involving services</i>	108		✓
<i>Services not further defined</i>	(109)		✓
Not stated		✓	✓
Not applicable		✓	✓

¹⁾ For the 'not further defined' categories of the high level of detail, the codes 'xx9' are proposed as the coverage is different from ISCED-F codes 'xx0' which actually refer to the next level of the classification.

²⁾ L = low level of detail; H = high level of detail.

Implementation guidelines

The 'field of the highest level of education successfully completed' refers to the educational attainment as reported in variable 'educational attainment level', and its implementation guidelines apply accordingly.

If the interviewer cannot code the answer with one of the fields, an open answer and post-coding is recommended.

According to the ISCED-F 2013 "inter-disciplinary or broad programmes and qualifications are those which combine several detailed fields of education and training where no single detailed field dominates." The standard categories 'inter-disciplinary programmes and qualifications involving xxx' (codes xx8) should only be used if there is no dominant subject; detailed classification rules and examples are described in the ISCED-F 2013.

The standard categories 'not further defined' (codes xx9) should only be used if it is not possible to classify to the exact narrow field. Their use should be avoided.

For further information about ISCED-F 2013 and its methodological implementation see <http://uis.unesco.org/en/tovvelpic/international-standard-classification-education-isced>. Questions on ISCED-F 2013 may be also addressed to the national ISCED coordinators.

Information for the different micro-data collections will be transmitted to Eurostat as follows:

Micro-data collection	Level of detail	
	High	Low
EU-LFS	X	
AES		X

Reference question

The question should ask about the field of the highest level of education successfully completed [educational attainment level]. It should be aligned with the question(s) used to ask about educational attainment, see reference question for variable 'educational attainment level'.

35) Interviewing mode used

Name of the variable

Interviewing mode used

Scope

The social micro-data collections EU-SILC, EU-LFS and AES³³

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population.

Concept The variable reports on the method used to collect information from the respondent, i.e. the interviewing mode used.

Category concept

The category concepts describe the interviewing mode (predominantly) used to collect information from the respondent, whether PAPI, CAPI, CATI, CAWI, or other.

In PAPI, CAPI and CATI an interviewer is present. CAWI is self-administered and the respondent follows a script provided in a website.

CAPI = computer assisted personal interview, i.e. interviewer is present

CATI = computer assisted telephone interview i.e. interviewer is present

CAWI = computer assisted web interview, self-administered

PAPI = paper assisted personal interview, i.e. interviewer is present

The category 'copied from previous interview' means that the entire record is copied from a previous interview³⁴. It does not cover situations like dependent interviewing with answers validated by the respondent. It may be not relevant for some data collections.

The category 'other' is to be chosen when the interviewing mode used is not covered by the other variable categories, e.g. paper assisted self-administered interview (PASI), or non-web-based computer assisted self-administered interview (CASI).

The category 'not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age). It can also be used in case all the information has been obtained from registers (i.e. administrative data) and/or imputed, and no interview has taken place.

³³ The standardised variable may be applied to other European social micro-data collections, as convenient.

³⁴ In case of application of simplification rules for elderly people or for permanently disabled people.

Categories for the variable

Interviewing mode used
Paper assisted personal interview (PAPI)
Computer assisted personal interview (CAPI)
Computer assisted telephone interview (CATI)
Computer assisted web-interview (CAWI)
Copied from previous interview
Other
Not applicable

Implementation guidelines

Different methods of data collection may be combined within a survey. Information may have been collected combining interview data with data obtained from registers (i.e. administrative data) or imputed data. In such cases, the present variable reports on the interviewing mode used to collect the interview data. Specific rules concerning quality reporting may be provided for each micro-data collection.

In addition, different interviewing modes may as well be combined (i.e. mixed-mode interview). In such cases, the interviewing mode predominantly used may be reported. For example, in a situation where a person has been first contacted by phone and some data (main part) has been collected via computer assisted web-interview (CAWI) but the missing data (remaining part) is collected at a later stage via computer assisted personal interview (CAPI), the variable should report on CAWI as the interviewing mode used. Specific rules concerning quality reporting may be provided for each micro-data collection.

In such cases –where administrative and survey data and/or different interviewing modes are combined–, however, it is advised to retain the information on the data collection method and on the interviewing mode used at the variable level. This option would be always preferable whenever possible (e.g. when technically feasible), in order to provide more precise information to monitor the possible impact of the interviewing mode on the survey results.

(36) Nature of participation in the survey

Name of the variable

Nature of participation in the survey

Scope

The social micro-data collections EU-SILC, EU-LFS and AES³⁵

Variable definition

Reporting unit Individuals

Filter Specific filters (e.g. aged 15+) may apply depending on the survey target population.

Concept The variable reports on whether the information requested has been provided by the designated respondent (i.e. direct participation), or via another person (proxy respondent, i.e. indirect participation).

The designated respondent is the person to provide the information requested, as indicated in the provisions for each micro-data collection.

The possibility of allowing indirect participation in a survey, the circumstances under which such practice may be allowed or the specific question/s that this practice may be limited to, as well as the criteria to identify those who may be entitled to participate in the survey on behalf of the designated respondent as proxy respondents –normally another household member or a family member– are context-specific for each micro-data collection.

Category concept

'Direct participation' refers to a situation where the designated respondent (as indicated in the provisions for each micro-data collection) has provided the requested information by him/herself, without the assistance of another person (other than the interviewer, in case that an interviewer was present). Direct participation also includes cases in which the designated respondent has provided the requested information with assistance of another person (e.g. translation, physical assistance) and has validated the answers provided.

'Indirect participation' refers to a situation where the information requested to the designated respondent (as indicated in the provisions for each micro-data collection) has been provided by a third person (i.e. proxy respondent) without being validated by the designated respondent. That is, a situation in which the designated respondent participates in the survey via another person. It also includes a situation where the designated respondent is assisted by another person due to impaired mental/psychological capacity (in which case his/her answers cannot be fully validated and are to be considered as 'proxy').

³⁵ The standardised variable may be applied to other European social micro-data collections allowing the use of indirect participation in the surveys, as convenient.

'Not applicable' is to be used to count statistical units which are part of the population of the data source but for which it systematically does not report any information on the variable (e.g. persons below a certain age). It can also be used in case all the information has been obtained from registers (i.e. administrative data) and/or imputed, and no interview has taken place.

Categories for the variable

Nature of participation in the survey
Direct participation
Indirect participation
Not stated
Not applicable

Implementation guidelines

Information on the 'nature of participation in the survey' is to be recorded by the interviewer if he/she is present (e.g. in case PAPI, CAPI or CATI³⁶) or otherwise by the respondent (e.g. in case of CAWI, PASI, or non-web-based CASI³⁷).

A situation where the designated respondent is unable to provide the requested information by him/herself (e.g. due the illness, disability, or language barrier) but is able to do so with assistance of another person and to validate the answers provided, is considered as direct participation.

A situation where the designated respondent is unable to provide the requested information (e.g. due the illness or disability) or not ready available (i.e. not available during the enumeration period) and has not validated the answers provided by the proxy respondent (i.e. proxy answers), is considered as an indirect participation (or indirect interview).

When conducting an indirect interview, it may be necessary to reword the survey questions to assure that they refer to the designated respondent, and not the actual (proxy) respondent.

Proxy answers are not appropriate for questions related to attitudes or opinions, for sensitive questions (e.g. health, etc.) or for information only the designated respondent would be likely to know.

The possibility of allowing indirect participation can contribute to reducing non-response and non-interview situations. However, the answers provided by a proxy respondent (proxy answers), may not be as accurate as the answers of the person actually designated to respond. The proportion of proxy answers is an indicator of the quality of the survey. It allows comparing direct and indirect interviews.

Direct and indirect participation in a survey may be combined. In such cases, the present variable reports on the nature of participation in the survey predominantly being used; specific

³⁶ PAPI (paper assisted personal interview), CAPI (computer assisted personal interview), CATI (computer assisted telephone interview).

³⁷ CAWI (computer assisted web-interview, self-administered), PASI (paper assisted self-administered interview), CASI (computer assisted self-administered interview).

rules concerning quality reporting may be provided for each micro-data collection. In such cases, however, it is advised to retain the information on 'nature of participation in the survey' at the variable level. This option would be always preferable whenever possible (e.g. when technically feasible), in order to provide more precise information to monitor the possible impact of the nature of participation in the survey on the survey results.

(37) Stratum

Name of the variable

Stratum

Scope

The social micro-data collections EU-SILC and EU-LFS

Variable definition

Reporting unit Individuals or households

Filter None

Concept The variable reports on the primary stratum corresponding to each observation unit (individual or household) in case the target population (or a part thereof) is stratified at the first stage of the sample design, providing identification codes for the different strata. The information recorded always refers to the situation at the time of the selection of the concerned unit (individual or household); it consequently does not refer to the strata used for post-stratification. Stratifying a population means dividing it into non-overlapping subpopulations, called strata. Independent samples are then selected within each stratum. The variable contains sampling information that is needed to calculate measures of spread (e.g. variance and standard deviation) and to observe changes over time.

Category concept

The category 'stratum identifier' provides the identification code of the stratum each observation unit (individual or household) belongs to. Stratum identification codes are to be used in case the target population has been stratified, or in case self-representing primary sampling units (PSUs) have been considered³⁸.

The category 'not applicable' is to be used in case the target population has not been stratified at the first stage of the sampling process (e.g. when the sample has been drawn by simple random sampling or by cluster random sampling), and self-representing PSUs have not been considered.

Categories for the variable

Stratum
Stratum identifier
Not applicable

Implementation guidelines

³⁸ Self-representing PSUs are PSUs selected with a probability of 1, which must be considered to be a stratum rather than a PSU.

Information on the variable should be filled for all waves (and/or panels), and it should always refer to the situation at the time of the selection of the concerned unit (individual or household).

In case the target population is stratified at the first stage of the sampling design (or in case of comparable sample design) , all primary strata receive a unique identification code which remains the same for the entire period in which the observation units (individual or household) having received this identification code remain in the survey. The stratum identification code should be consistent over time for each observation unit (individual or household).

The information in variable 'stratum' should enable the identification of all strata. Combining 'stratum' with other variables (such as 'region') should not be necessary to identify the strata; 'region' should refer to the moment of the interview, while 'stratum' should refer to the moment of the selection.

In cases of variations of territorial units, such as blending of municipalities, the value of 'stratum' shouldn't change over time; it should always refer to the situation at the time of the selection.

For the purpose of estimating measures of spread (e.g. variance and standard deviation), each self-representing primary sampling unit (PSU), i.e. PSU selected with a probability of 1, must be considered to be a stratum rather than a PSU. As a result, each self-representing PSUs receive a separate and unique stratum identification code which remains the same for the entire period in which the observation units (individuals or households) having received this identification code remain in the survey.

If strata in the sample consist of only one PSU selected among a larger number of PSUs in the stratum population, or if strata in the sample contain only one PSU (among a larger number of selected PSUs) with respondents, primary strata have to be collapsed such that every stratum consists of at least two PSUs. If done, this grouping will ideally be implemented between strata that are most similar in terms of the variables used for stratification.

The variable PSU should be left blank when a sample of individuals has been drawn and the population has not been clustered.

It is a good practice to randomise the stratum identifiers to avoid the indirect identification of respondents (make the linking to particular locations or geographical pattern impossible). However, the randomisation process should ensure that the value of 'stratum' for a respondent don't change over time.

(38) Primary sampling unit

Name of the variable

Primary sampling unit (PSU)

Scope

The social micro-data collections EU-SILC and EU-LFS

Variable definition

Reporting unit Individuals or household

Filter None

Concept The variable reports on the primary sampling unit (PSU) corresponding to each observation unit (individual or household) in case the target population is divided into clusters, providing identification codes for the clusters or PSUs. The information recorded always refers to the situation at the time of the selection of the concerned unit (individual or household). A population is divided into clusters (i.e. disjoint sub-populations) in case direct-element sampling is either impossible (due to lack of sampling frame) or its implementation too expensive (the population is widely distributed geographically). A sample of clusters (PSUs) is then selected at the first stage of the sampling process (or an alternative multi-stage selection process). The variable contains sampling information that is needed to calculate measures of spread (e.g. variance or standard deviation) and to observe changes over time.

Category concept

The category 'primary sampling unit identifier' provides the identification code of the selected PSU each observation unit (individual or household) belongs to, in case the target population has been divided into clusters in the first stage of sampling.

The category 'not applicable' is to be used when the target population has not been clustered at the first stage of the sampling process, e.g. when the sample has been drawn by simple random sampling or by stratified random sampling.

Categories for the variable

Primary Sampling Unit (PSU)
Primary sampling unit identifier
Not applicable

Implementation guidelines

Information on the variable should be filled for all waves (and/or panels), and it should always refer to the situation at the time of the selection of the concerned unit (individual or household).

In case the target population is clustered at the first stage of the sampling design, the selected clusters (PSUs) receive a unique identification code which remains the same for the entire period in which the observation units (individual or household) having received this identification code remain in the survey. The PSU identification code should be consistent over time for each observation unit (individual or household).

In case that sampling with replacement is used and the same PSU is selected several times ('multiple hits') the PSU receives a unique identification code for every hit. The variable PSU should be left blank when a sample of individuals has been drawn and the population has not been clustered.

In the situation where dwellings are selected at the first stage of sampling and more than one household shares the same dwelling, dwellings must be regarded as clusters of households and then coded accordingly. Then, if the first³⁹ stage of the sampling design consists of a selection of dwellings, each dwelling receives a unique code for category 'primary sampling unit identifier' that remains the same for the entire period the households in the considered dwelling remain in the survey sample.

If the first⁴⁰ stage of the sample design consists of a selection of households and the final observation unit is the individual, each household receives a unique code for the category 'primary sampling unit identifier' that remains the same for the entire period the household remains in the survey. Split-off households keep their original PSU identifier at the moment of selection.

It is a good practice to randomise the PSU identifiers to avoid the indirect identification of respondents (make the linking to particular locations or geographical pattern impossible). However, the randomisation process should ensure that the value of 'PSU' for a respondent don't change over time.

³⁹ This does not necessarily imply that there is a second stage of sampling.

⁴⁰ This does not necessarily imply that there is a second stage of sampling.