



# **HOUSEHOLD BUDGET SURVEY (HBS)**

METHODOLOGICAL MATERIAL

**REVISION**

Podgorica, 2014

## **Preface**

Household Budget Survey - HBS is conducted pursuant to the Law on Statistics and Statistical System of Montenegro and the Programme of Statistical Surveys from 2005 to 2010 (Official Gazette of the Republic of Montenegro 69/05).

To enable the international comparison of data, HBS was harmonised with international standards and recommendations of EUROSTAT and International Labour Organization - ILO in 2005.

The HBS collects data on income – by sources, data on expenditures – by purpose of consumption, and data on items spent for personal consumption. Additionally, the HBS collects the data on some important indicators of living standards, such as equipment of household with durable goods, housing conditions, type of heating, etc.

This survey provides data necessary for producing the balance of personal consumption in the NA system, and data necessary for obtaining the weights used for the calculation of CPI. The data obtained through this survey are also used for producing the poverty line.

## TABLE OF CONTENTS:

|   |    |
|---|----|
| Preface.....  | 2  |
| 1. Legal basis .....  | 5  |
| 2. General part.....  | 5  |
| 2.1. Introduction.....  | 5  |
| 2.2. Purpose of survey.....   | 6  |
| 2.3. Subject of HBS .....   | 6  |
| 2.4. Use of HBS data and data users.....  | 7  |
| 2.5. Survey units .....   | 7  |
| 2.6. Territorial coverage.....  | 9  |
| 2.7. Collection period, reference period.....                                     | 9  |
| 2.8. Instruments and survey method .....  | 9  |
| 2.9. Data confidentiality.....  | 10 |
| 2.10. Survey sample.....  | 10 |
| 3. Organization of preparations and conducting HBS .....                          | 11 |
| 3.1. Activities of controller (coordinator) .....                                 | 11 |
| 3.2. Activities of interviewers .....   | 12 |
| 3.3. Access to household.....   | 14 |
| 3.4. Concentration of survey material.....  | 15 |
| 3.5. Data processing and tabulation .....   | 15 |
| 3.6. Publishing the data.....   | 16 |
| 3.7. Survey financing .....   | 16 |
| 1. Guideline for conducting the survey, work of interviewers and controllers..... | 18 |
| 1.1 Identification of household .....   | 18 |
| 2. Filling of questionnaire .....   | 19 |
| 2.1. Guideline for filling diary D -1 .....                                       | 19 |
| 2.2. Guideline for filling the questionnaire P-1 .....                            | 23 |
| 2.3. Guideline for filling questionnaire P-2 .....                                | 34 |
| 2.4. Guideline for filling questionnaire P-3 .....                                | 43 |
| 2.5. Guideline for filling questionnaire for non-response (NO-4) .....            | 47 |

## **FIRST PART**

## **1. Legal basis**

The HBS is conducted pursuant to the Law on Statistics and Statistical System of Montenegro and the Programme of Statistical Surveys from 2009 to 2014 (Official Gazette of the Republic of Montenegro 69/05).

## **2. General part**

### **2.1. Introduction**

The survey on personal consumption of population was conducted every fifth year as a periodical survey, and it was conducted for the first time in 1963. Since 1973 this survey was conducted under name Survey on Income, Expenditures, and Consumption of Households. In the meantime, the following surveys were also conducted: Survey on Income and Expenditures on Workers' Households in 1957; and Survey on Living Conditions of Population in 1966.

The mentioned surveys were not mutually harmonised in relations with the sample plan, contents and applied classifications. Aimed at the survey integration, a theoretical compilation of sample and methodological harmonisation of Survey on Household Budgets of Workers' Families, Survey on Rural Households, and Survey on Income, Expenditures and Consumption of Households was done during 1983. Since then, the surveys are conducted under the standard name: Household Budget Survey (HBS).

Since 1983, the HBS is conducted with five-year periodicity on a larger sample (1 100 households in the Republic of Montenegro) and with annual periodicity on a reduced sample (380 households in the Republic of Montenegro).

The HBS was harmonised with international standards and recommendations of Eurostat and ILO in 2005, thus enabling the international data comparability.

## **2.2. Purpose of survey**

Purpose of HBS is to collect the data on:

- Income, expenses and consumption of households;
- Certain important indicators of living standards (equipment of households with durable consumer goods, housing conditions, type of heating, etc.);
- Demographic characteristics of households;
- Economic activities of household members;
- Sociological characteristics household members;
- Subjective positions of households related to certain important living issues.

One of specific objectives of HBS is to obtain the data necessary for producing the personal consumption balance in the NA system. The results of this survey are used for the production of poverty line and poverty analysis; observation of population's consumer habits; and basis for adopting the measures of economic and social policy.

## **2.3. Subject of HBS**

Compliant with the objectives to be achieved by HBS, the data collected will refer to the following:

- Basic social and demographic characteristics of household members;
- Amount of household earnings, by income sources;
- Amount of household expenses, by purpose;
- Values of given and received gifts;
- Indicators of living standards of households (data on dwelling, possession of durable goods, etc.);
- Elements of holdings;
- Subjective opinion of households on certain important issues on living (finances, education, safety, etc.).

## 2.4. Use of HBS data and data users

The data obtained through the HBS are used for:

- Analysis of both level and structure of personal consumption of households – total and by groups;
- Analysis of income, expenditures and consumption of households;
- Analysis of certain indicators of living standards;
- Establishing the database for the production of weights for calculating the CPI;
- Establishing the database for calculation the final consumption balance in the NA system;
- Production of poverty line and poverty analysis.

The HBS data users are: Statistical Office of Montenegro; Government and government institutions; scientific and research institutions; international institutions; media, consumers; other legal and natural persons.

## 2.5. Survey units

**Survey unit** is any sampled household, both one-person household and multi-person household.

**Household** is considered to be:

- a) Group of persons living together, spending their income on food and other essentials for living (multi-person household). Usually, this type of household comprises spouses, children, and other relatives and non-relatives (subtenants, attendants, permanent workers in agricultural holdings, etc.);
- b) A person who lives alone in a separate housing unit, spending his/her income separately (one-person household).

‘Living together’ refers to mutual housing unit, i.e. combining to live in the same housing unit.

**Household members** are considered to be:

- Members of household temporarily absent (due to the military service, imprisonment less than 12 months) and they are covered by the survey;

- Pupils and students, encountered in households members, regardless of the period of stay out of their households (in schools and on studies);
- Daily and weekly migrants; persons working or studying in another place in the country or abroad, and having economic relation with households (they do not have their household in another place) in which they stay more than a month during the year are also included in household members and they are treated as a temporarily absent persons.

Persons staying in another place in the country or abroad for longer period (12 months and over), and rarely return or do not return are treated as permanently absent persons, and they are excluded from the survey.

Lodgers living together in the same housing unit with the household, but not spending on food together with other occupants of the housing unit are not counted as members of that household, but they form a separate household with the residence on that address, and they are surveyed as a separate household in the housing unit.

The survey does not cover members of so called collective households (hospitals, prisons, religious institutions, boarding schools, etc.), because these are persons with no fixed place of living, i.e. residence. But, if a person stays in the collective household less than six months, then they are covered by the survey (a person is financially linked with the household).

Temporarily present persons (guests and similar) which are members of other households are not covered by the survey.

**Head of the household** (reference person) is household member recognisable to other household members. The head of household is selected by the household members. This is often a person making important decisions or responsible for finances and wealth of household members. It is necessary to precisely select a household member.

It is significant to group the household members by age.

**Adults** - household members aged 15 and over.

**Children** - household members aged up to 14 years.



## **2.6. Territorial coverage**

The HBS is conducted in Montenegro, and data processing provides the data for Montenegro (total), for urban and rural area and for Podgorica.

## **2.7. Collection period, reference period**

The data are collected for the entire observed year (income, expenditures and consumption - from 1 January to 31 December), and any household is observed during one month.

The observation period for spending items, agriculture and other (handicraft, etc.) is one month.

Reference period for durables is 12 months and for semi-durables is 3 months.

## **2.8. Instruments and survey method**

The HBS applies the method of keeping diary (D-1), and method of interviewing households (interview method) on the basis of questionnaire (forms P-1, P-2, P-3 and questionnaire for non-response NO-4).

A household keeps the diary on spent items, agriculture, and other (handicrafts, etc.) for the period of one month.

Interviewing the households based on the questionnaire is done by specially trained interviewers who should make at least three visits to a household (providing the assistance in keeping the diary and data collected by using the questionnaire).

## **2.9. Data confidentiality**

Individual data (for persons and household) obtained through interviewing are official secret and all participants in the survey must respect this. The access to the filled questionnaire is not allowed to persons who are not officially responsible for conducting the survey. It is not allowed that the filled questionnaires are seen by other persons (not to be left on visible place in the vehicle, in public place, etc.), except in a premise envisaged for this. Collected data on individual households and their members are confidential, and there should be pointed out to respondents that the data confidentiality is guaranteed.

The results obtained through the interviewing are published in the aggregated level, thus disabling the presentation of data on individual level.

## **2.10. Survey sample**

The HBS uses the two-stage, stratified sample, with the enumeration areas as primary and households as secondary units of selection. Accordingly, units of basic set are households complying with the set definition.

Main geographic strata are: Podgorica and other part of Montenegro.

Primary units (enumeration areas) based on the 2003 Census are classified in two groups: urban and rural depending on the type of settlement they belong to. Every month there are selected 26 enumeration areas, i.e. 130 households. The last step of stratification is the grouping of primary units by size (defined by the number of households). Every established group of enumeration areas is dedicated with the appropriate primary units according to the number of households. In this manner, two-sized strata are formed of the same or similar to the total number of households. Allocation of the sample with the primary units by areas – urban and rural, is proportionate to the number of observed units in those groups.

Since 2012 the survey sample comprises 1 820 households. Every month there are selected 19 enumeration areas, i.e. 152 households.

### **3. Organization of preparations and conducting HBS**

#### **3.1. Activities of controller (coordinator)**

Duties of controller over HBS are the following:

- To prepare and organize conducting the survey on his/her field in coordination with supervisors;
- To participate in the training (compulsory);
- To be familiar with all guidelines and forms for preparations and conducting the HBS, and especially the procedure of surveying and filling the diary (D-1) and other forms (P-1; P-2; P-3; NO-4 );
- To be familiar in details with the guideline for conducting HBS;
- To keep the contact with interviewers and to solve problems the interviewers are facing in the field, and necessary to contact the supervisor from the Statistical Office;
- To be informed on the rent amount asked for dwellings in the surveyed area, and to enter the amount of imputed rent together with the interviewer (question 78, form P-2);
- To overtake the filled survey material from the interviewer (under defined deadline) and to control it;
- After the controller has finished the control of survey material, he/she signs the validity of material.

When controlling the survey material, the controller must check:

- Completeness of coverage by address list;
- If the interviewer has correctly entered the identification data (placed on the first page of every form);
- Logic and completeness of entered data in all forms;
- Accuracy of data entered in the form NO-4 (questionnaire for non-response, if needed).

If needed, the controller will ask from the interviewer to repeat the interview. After the work is finished, the controller will write the report on conducted survey, assess the interviewer's work by giving or not giving the recommendations for further work. Afterwards, he/she submits the checked survey material to Statistical Office of Montenegro together with the data on work done by interviewer (name and surname, number of households surveyed and other elements necessary for the payment in cash to the interviewer).

### **3.2. Activities of interviewers**

Interviewers are main carriers of survey, i.e. participants on whom the success of survey depends. The quality of data collected depends on their understanding of survey's importance, knowledge about procedure, manner of surveying, and all questions in the forms. Successful conducting the survey depends to an important degree on persistence of interviewers and their efforts put in achieving the cooperation with selected households. Selected interviewers should be communicative, educated, dynamic and efficient persons; on the basis of accepted criteria the network of interviewers has been established.

**Interviewer must** do on time and in a responsible manner all jobs for which he/she is responsible for:

- Interviewer must participate in the training;
- Interviewer must meet defined deadlines;
- Interviewer should be familiar with all guidelines and forms for conducting the survey, and especially the procedure of surveying and filling the diary (D-1) and other forms (P-1; P-2; P-3; NO-4);
- Interviewer must finish the surveying under defined deadline;
- Interviewer must make one visit to selected households before the interview period starts. If he/she is not able to make the contact with household, the interviewer is obliged to visit the household several times, and then to fill the form NO-4, and to inform the controller about it;
- Interview must not interview the household which are not selected by the sample;

- If the interviewer does not find the solution for certain problem in the guideline for interviewers, the interviewer should contact the controller or Statistical Office of Montenegro (supervisor) and to ask for the explanation;
- If the interviewer did not fully complete the forms, he/she should visit again the household.

Every interviewed household answers to questions from forms (P-1, P-2 and P-3) on the basis of interview and keeps the diary (D-1) for the reference period in line with the instructions. During the first visit, the interviewer visits all households that should be interviewed; the interviewer enters the identification data in all forms; he/she encourages households to cooperate and after obtaining positive answer, the interviewer records them (he/she enters the identification data on the first page of all forms, and phone number of households, if there is one), he/she leaves the diary with the explanation on how it is managed and who is managing it (housewife, i.e. a person who most often does the shopping), and fills the form P-1. Then, the interviewer arranges the second visit to the household (recommendation is to have it in the middle of month). During the second visit, the interviewer checks the filling of the diary; provides necessary explanations to household members and fulfils the form P-2. After the end of reference period, the interviewer visits for the third time the household; takes the diary and fills the form P-3. After obtaining the diary, the interviewer reviews the survey material and submits it to the controller.

If the household does not want to cooperate or the interviewer finds out that the household is permanently absent after having several times visited it, and that the dwelling is not used for housing, that the mentioned address is not matching with the one in the field, etc., he/she marks one of modalities provided in the form NO-4, as a reason the contact was not established with the household, i.e. the interviewing was not done.

### **3.3. Access to household**

The interviewer must be aware that the cooperation of household is voluntary and the data quality depends on the willingness of household to cooperate, and on the number of households which will accept to be interviewed. Thus, the access of interviewer to the household is very important, both with his/her ability to assure the household of the necessity to cooperate. The household should be visited in such a manner that the household has the trust in the interviewer and that the survey is observed as a general need. The interviewer visits the household to have the approval of household for taking part in the survey. In any case, the household will accept or not to cooperate depending on the introduction made by interviewer.

When visiting the household, the interviewer should:

- Present himself/herself to the household member;
- Show the authority letter from Statistical Office of Montenegro;
- Explain the purpose of his/her visit;
- Use the letter as the reference for arriving of the interviewer. If the household has not received the letter, the interviewer hands in the copy of letter with the visible seal of Statistical Office of Montenegro. After the representative of household becomes familiar with the contents of letter, the interviewer should stress out the importance of having every selected household participating in the survey, since non-participation can jeopardize the success of this expensive and important statistical action. It should be stressed out that the anonymity for participants are completely guaranteed, that the households are randomly selected, that all data of households are confidential and they only serve for the purposes of statistical survey;
- Explain that the household will keep the diary (for one month, in current month) and that the interview, as a second part of the survey, will be conducted as agreed. Additionally, the interviewer must be careful about deciding the time most convenient for the household to be interviewed. The interviewer must visit the household in the time agreed with the household members, and do the interviewing in the dwelling. It is desirable to

have present, in addition to the household member that provides the data, only household members, and not outside persons (neighbours, friends, etc.).

### **3.4. Concentration of survey material**

The controller successively takes over the material from the interviewer and he/she checks the completeness. The survey material (forms and diaries) is submitted by the controller to Statistical Office of Montenegro (the latest 10 days after the end of interview period). The controller submits the list of interviewers (name and surname) who successfully performed the interviewing.

### **3.5. Data processing and tabulation**

The data processing is done for all households – total and separately for households in urban and rural area. The processing is done as the average per household and as the average per household member. After the data processing is finished, the data can be tabulated in the following manner:

- Durable goods existing in the household (car, PC, TV, washing machine and dish washer, video, etc.);
- Total cash costs (expenses) of household (food and beverages; alcoholic beverages and tobacco; clothes and footwear; housing, water, electricity, gas and other fuels consumption; furniture, furnishing and maintenance; health; transport; communication; recreation and culture; education; restaurants and hotels, and other goods and services);
- Household income;
- Income and expenditures of households engaged with agriculture, hunting and fishing;
- Income and expenses of household engaged with small business;
- Quantities of food products in households.

### **3.6. Publishing the data**

The data obtained are published in the form of release (annual periodicity), and in other statistical publications (Statistical Yearbook). The data are also published in the electronic form (on the website of Statistical Office of Montenegro).

### **3.7. Survey financing**

Financial resources for surveying the households covered by the sample and aimed at obtaining the data for Montenegro are provided from the Budget of Montenegro. This is the source for financing:

- Daily allowances and travel expenses for the existing network of interviewers;
- Allowances for interviewers for taking part in the conducting of survey;
- Funds for training of new interviewers, i.e. for replacing interviewers with the existing interviewer's network;
- Consultations during the year with all participants in the survey;
- Funds for publishing the obtained results.



## **SECOND PART**

## **1. Guideline for conducting the survey, work of interviewers and controllers**

### **1.1 Identification of household**

The identification of household comprises the procedure applied in searching the selected household. After having successfully finished training and passed the test, the interviewer receives the list of address for selected households which should be interviewed. The list of selected households comprises the following data:

- Code of municipality;
- Code of settlement;
- Code of enumeration area;
- Ordinal number (ordinal number of selected household in enumeration area);
- Name and surname of person on whose name the household is kept;
- Address of dwelling/house (street name and number) where the selected household lives.

After arriving on requested address, and after the household accepts to participate in this survey, the interviewer must enter all data from the list of selected households in appropriate places on the front page of forms (D-1; P-1; P-2; P-3, and NO-4). If the interviewer in selected housing unit does not find anyone at home or finds a person not able to provide the answers in the name of other household members, the interviewer must visit again the household. Up to five visits of interviewer to individual household is recommended.

When defining the number of households in the housing unit, the interviewer follows up the definition of household and explanations given in this methodology.

## 2. Filling of questionnaire

### 2.1. Guideline for filling diary D -1

The diary is filled for a month. A person that keeps the diary enters his/her name, surname, and address in the diary. The interviewer enters (in the defined field) day and hour of visit to the household (the data are used in the checking phase).

**Code of survey** – entered in the diary.

**Code of diary** – entered in the diary.

**Code of region** – is copied from the list of selected households (address list).

**Municipality** - is copied from the list of selected households (address list).

**Settlement** - is copied from the list of selected households (address list).

**Code of enumeration area** - is copied from the list of selected households (address list).

**Stratum** - is copied from the list of selected households (address list).

**Month and year** – the first two fields are entered with the month, and the rest two fields with the last two year numbers (e.g. 03. 2005 – there is entered 0305).

**Ordinal number of selected households in the enumeration areas** – is copied from the list of selected households (there is entered the number from the address list under column Ordinal number).

**Ordinal number (Code) of household member who filled the diary** – is copied from the questionnaire P-1.

The diary daily records expenses for **purchased products and services** during one month of interview period. The diary is kept by the household member who is familiar with the consumption in the household. The diary should record all purchases of household for a month period, regardless if the purchased products are paid by the household's money, from the collective enterprise fund<sup>1</sup>, borrowed money or from some other source, and regardless if the payment is done in cash, by cheque, credit card, postal money order or some other means of payment.

---

<sup>1</sup> All employees in an enterprise put certain amount of money, and this jointly owned budget is used by an employee who is in the need for financial assistance or who is selected at the end of the year.

Expenses are **daily** entered so that the possibility of being forgotten is avoided. There should be entered the costs for every individual product or service, regardless of their level (**small or large** amount of money). Additionally, all expenses should be **in details described**. The household member who keeps the diary should enter also purchases performed by another person or with the money of household. In addition to the products purchased in the domestic market, there should be also recorded products purchased abroad. The measurement unit must be marked (kg, g, pair, box, litre, piece, slice, etc.). The values are entered **in euro**. The household uses the bills from shops, if kept by the household. The diary records all household's income during the interview period.

**Purchase on loan, instalments, and deferred payment** – if the household during reporting period of month purchased something **on loan or as deferred payment**, a whole amount of purchase should be entered, no matter the instalments are paid in another period. If **an instalment of another purchase** should be paid in a month when the diary **should** be filled, this amount is **not** recorded.

If the household during the reporting month **went on holiday or shopping abroad**, the values of purchased products are recorded and expressed in euro, and code 5 is circled in the diary, column 6 – where the place of purchase is marked. Under Column 6 an appropriate code must be circled for the place of purchase of product or service (supermarket, shop, stand, miscellaneous, abroad).

**Supermarket** is considered to be a large shop or hypermarket (Mex, Carine, Maksi, Rodic, etc.). **Shop** is small store/shop. **Stand** can be both on street or in market (it does not need to be registered). **Miscellaneous** can be purchases of products or services via advertisements, using internet, phone orders, through commercial traveller, etc.

The products from own production are recorded in all columns from the diary, except for column 6. In the diary, under column 5 (paid in euro), the value of products and services from own production is entered by market prices.

If the household during the reporting period **on holiday in the country or abroad**, it is necessary that the household members take the diary with them and daily keep records on expenses.

A household member who keeps the diary should enter every day a new page of the diary, and at the end of the day he/she should check if all costs are recorded. Additionally, there is a need for detailed description of expenses for food and beverages out of the household as well as transfers, received and given gifts. Their value should be estimated (independently or with the help of controller).

### **Reminder for daily expenses**

Among a wide range of products that can be purchased in the trade network, the list of products mostly used in the household is provided, since there is a possibility that they are not recorded (they are forgotten) in the diary.

### **List of most common products (food and beverages used by the household):**

1. Flour, sugar and salt
2. Rice
3. Instant soups, ketchup, mayonnaise, and sausages
4. Croissant, burek, and other baking products
5. Pasta
6. Snacks
7. Beer, wine, brandy, and other alcoholic beverages
8. Cigarette
9. Newspapers, napkin, toilet paper, etc.
10. Products for personal care and products for maintenance of dwelling
11. Petrol, parking, payroll, taxi and city transport
12. Vitamins, drugs
13. Expenses for different courses (foreign language, fitness, driving licence)
14. Tickets for cinema, theatre, matches

**How to enter the names of products purchased during one day within the survey month?  
(Look at the example below)**

Every product should be described in details (e.g. column 2, cotton material, loaves of white bread, cigarettes "Lovcen", etc.). Column 3 should be entered with the quantity of product (e.g. for bread, there is entered 1.2). Column 4 is entered with the measurement unit (e.g. there is kg for bread). Column 5 is entered with the cash amount (e.g. for bread there is entered 1.20 EUR). Under column 6 there is entered place where the product is purchased (e.g. for bread there is a mark 1, meaning that it is purchased in the supermarket). It is necessary to mark the transaction under column 7 (e.g. for bread it is marked 1, meaning that it is purchased), and the purpose under column 8 (e.g. for bread there is 1, meaning that its use/purpose is personal). Cash costs for food and beverages out of household must be in details described (e.g. two meals in the restaurant, entered in the column 2). If the household received a gift, it is entered in the column 2 (e.g. chicken), and column 7 is marked with 4 (it means that the chicken is received). The product from own production is entered in the column 2 (e.g. bouquet of roses), and the column 7 is marked with 2 (e.g. for the bouquet of roses there is marked 2, meaning that it is from own production). Additionally, the income should be in details described (column 2, cash allowance for the transport), and the code 6 is marked in column 7.

**Other notes**

All cash amounts in the dairy (D-1) and forms (P-1; P-2; P-3) of HBS are expressed in euro and cents. The interviewer does the coding of the daily consumption in the diary (D-1) (using the code list of products and services for the Household Budget Survey for 2005; HBS COICOP). The code for occupation of respondents is entered in the form P-1 by the interviewer (using the code list of occupation).

## 2.2. Guideline for filling the questionnaire P-1

The questionnaire is filled for a month. The interviewer enters (in the envisaged field) day and hour of visit to the household (the data is used in the control phase). The interviewer enters the data on respondent (name and surname, phone) in the envisaged field on the form P-1, before it is submitted to controller.

**Code of survey** – entered in the questionnaire.

**Code of questionnaire** – entered in the questionnaire.

**Code of region** – is copied from the list of selected households (address list).

**Municipality** – is entered from the list of selected households (address list).

**Settlement** – is copied from the list of selected households (address list).

**Code of enumeration area** – is copied from the list of selected households (address list).

**Stratum** – is entered from the list of selected households (address list).

**Month and year** – the first two fields are entered with the month, and the last two fields with the last two numbers of year (for ex. 03 2005 – there is entered 0305).

**Ordinal number of selected household in the enumeration area** - is copied from the list of selected households (there is entered the number from the address list from column Ordinal number).

**Demographic characteristics of households** (are filled for all household members).

1. The data on household members
  - Under the number 1 there is entered name and surname of the head of household (column 1). Other household members are entered by order, from the closer family members (spouse, single, children, if there is some) to other household members (relatives and non-relatives), in columns from 2 to 23. Within the family, members should be entered from the oldest to the youngest ones. If the household has more than 10 members, the interviewer will use another (empty) form. Ordinal number under which the household member is entered represents the **code of household member** and it must be followed until the end of survey. The interviewer **must** read to the respondents a question and all provided

modalities (responses), to have the respondent understands the question and gives the accurate answer.

2. Presence of member in the household (12 months before the beginning the interview period)

- For every member there is entered the number of months of his/her presence in the household during 12 months. For persons moved in, adopted or born in the last 12 months and which became household members, there is entered the number of months passed from including in the household to the moment of interviewing (e.g. if the child is born on 11 September 2004, there is entered 6 in the survey which is conducted on 1 March 2005).

3. Reason for the absence from the household

- There are entered provided answers (e.g. if the member is on the military service, there is entered 3 in the column of code for that household member).

4. Relation of household members with the head of household

- There are entered provided answers (e.g. if the member is spouse to the head of household, there is entered 2 in column of code for that household member). For every household member there is entered established relation toward the head of household. If necessary, the interviewer may explain that this question is important for defining the composition of household.

5. Gender of household member

- For every household member there is entered: 1 for male, and 2 for female.

6. Years of age

- For every member, there is entered the number of reached years of age. For children of age up to 6 months, there is entered 00.

7. Marital status



- For every household member aged 15 and over, there is entered the established status (e.g. for spouse in the legal marriage, there is entered 2).

#### 8. Country of birth

- For every household member, there is entered the country of birth according to the current borders and the name of the State (for example, if someone was born in Yugoslavia there is entered the current name of the country where someone was born: Montenegro, Serbia, Bosnia, etc.)

#### 9. Citizenship

- For every household member, there is entered the citizenship which a person has.

**Remark: For household member under the age of 15 years do not ask questions from 10 to 23.**

#### 10. Did a person attend some kind of education?

- Give the answer did a person educate in mainstream education system in last 12 months. There is entered for all household members aged 15 and over. If the answer is YES, enter code 1 and move on to the next question, and if the answer is NO enter code 2 and go to question 12.
- **Pay attention to "jump".**

#### 11. What level of education you are currently attending?

- For all household members aged 15 years and over there is entered one of offered answers level of education which a person is attending in column code of that household members (for example, if a household member attending high school, enter the code in column 4 of the members of household).

#### 12. What level of education you have successfully completed?

- For all household members aged 15 and over there is entered completed school (the highest level of completed school). The definition of school attainment is considered to be the highest level of education acquired by education in regular or special education programme (e.g. a person who is studying during the period of interviewing will answer this question with the previously completed school). For household members who were not finished any class of primary school, there will be entered 0.

13. What was your current activity status in previous week?

The term **employee** in the survey refer to persons who perform any work for wage or profit during the previous week, even for one hour.

- Pay includes cash payments or "payment in kind" (payment in goods or services), disregarding whether the payment was received in the week the work was done or not. Persons who receive wages for on-the-job training (apprentices or trainees) are also considered as employees. Self-employed persons with a business, farm or professional practice are also considered to be working if one of the following applies:

- A person who works on its own business, professional practice or farm for the purpose of earning a profit, even if the enterprise is failing to make a profit;

- A person who spends time on the operation of a business, professional practice or farm even if no sales were made, no professional services were rendered, or nothing was actually produced (for example, a farmer who engages in farm maintenance activities; an architect who spends time waiting for clients in his/her office; a fisherman who repairs his boat or nets for future operations; a person who attends a convention or seminar).

- A person who is in process of setting up a business, farm or professional practice, such as buying or installing of equipment, renting the office or ordering of supplies in preparation for opening a new business.

- A person who works on its own agriculture farm should be considered as employed if they were working during the reference week. A person who works on its own small agriculture farm, and sell their products are also considered as employees.

- A family workers - a persons who assisted other member of the household in running family business or agricultural holding, without receiving any formal pay are considered as employees.

**Unemployed** - a member of the household aged 15 and over who is in previous week.

- **Without work** – member of household who did not have any paid employment or self-employment during the previous week and did not have any paid work.
- **Searched work** - a member of the household who was actively searching a job during the previous four weeks ( steps were taken to seek paid employment or self-employment);
- **available to work** - within two week

**Pensioner** - a member of the household receiving an allowance (pension) based on his/her finished work or based on work done by the family member (widowed person, child).

**Student** - a member of the household who attend education institutions (not employed).

**Housewife** - a member of the household aged 15 and over, engaged in home duties.

**Persons with long-term or permanent disabilities** - household member who is unable to work due to disability (illness, etc.).

**Other inactive person** – all those not classified. ( for example serving a prison sentence)

- If a household member is employed (Code1), employed but temporarily absent (code 2), go to question 14

- If a household member is unemployed (code 3), retired (code 4), pupil / student (code 5), housewife (code 6), a person with long-term or permanent disability (code 7), or other inactive persons (Code 8) go to question 20

#### 14. Occupation

- It is filled for household members aged 15 years and over. The occupation is defined by the type of job (work) performed by a person aimed at earning for essentials (during 12 months passed before the beginning of interview period). The answer of respondent on the question **on occupation** must be detailed and clear, so that the interviewer can enter the accurate code of occupation. If respondent does not know the name of occupation, he/she should describe shortly activities performed on his/her working place. Based on the obtained information, the interviewer should conclude about what occupation is about and to precisely enter the code (in column of member code). If some household member performs activities based of which can be estimated that he/she has several occupations, the occupation is defined by jobs which are done the most part of the working time (e.g. teacher in primary school, and engaged in sewing clothes is coded with 23). Household members engaged in different agricultural activities aimed at production for their own needs are coded with 63.
- For example person who completed the Faculty of Economy at the rank of an economist. If performs statisticians or trader, his occupation is a statistician, or a merchant (see examples in Table 1).

Table 1 Examples of partial and generalized answers and examples precise answer

| Partial and generalized answers          | An example of precise answers   |
|--|---|
| farmer                                   | livestock producer, field crop grower, tree grower, gardener, forestry worker, apiarist, agricultural worker - producer for own needs |
| agricultural worker                      | agricultural assistant worker (in livestock farming, field - crop farming, etc.).   |
| fishery water worker                     | inland waters fishery worker, costal waters fishery worker, fishery worker in the pond  |
| a metal trades worker                    | metal moulders, sheet metal worker, coremakers,   |
| wood treater                             | wood treater mechanic, wood-treater industrial  |
| baker, butcher                           | baker artisan , baker industry, butcher artisan , butcher industry  |
| professor, teacher                       | secondary school teacher, vocational school teacher, university teacher   |
| clerk, referent, inspector, professional | referent of Registrar, referent of Social Protection, sanitary inspector of Sanitary, legal professional                              |
| supervisor                               | mining supervisor, weving supervisor, the foreman in production of nitrogen   |
| engineer                                 | construction engineer, electrotehnology engineer, mechanic engineer, etc.   |
| technician                               | construction tehnician, mechanical tehnician , mining technician, etc.  |
| artist                                   | authors , visual artist , creative artist, etc.   |
| unskilled worker                         | hand packer, meter reader, freight handler, shelf filler,and so on.   |
| chief executive                          | chief executive - manager in agriculture (in construction, trade, hotels and restaurant, transport, finance, etc.).                   |

15. What is the main economic activity of enterprise where a person works? (Specify the name of the enterprise)?

- Name of economic activity

The answer is given by entering the precise name of the economic activity of enterprises, institutions, banks or some other form of organization where a person works. Based on information received, the interviewer should conclude about activity and to accurately enter code (in column codes of members), for example. name of economic activity, Manufacturing - enter the code C.

Examples of economic activities:

Classification of Economic Activities

| SECTOR | NAME AND DESCRIPTION OF ECONOMIC ACTIVITIES   |
|--------|---|
| A      | Agriculture, forestry and fishing   |
| B      | Mining and quarrying  |
| C      | Manufacturing   |
| D      | Electricity, gas, steam and air conditioning supply   |
| E      | Water supply; sewerage, waste management and remediation activities   |
| F      | Construction  |
| G      | Wholesale and retail trade; repair of motor vehicles and motorcycles  |
| H      | Transportation and storage  |
| I      | Accommodation and food service activities   |
| J      | Information and communication   |
| K      | Financial and insurance activities  |
| L      | Real estate activities  |
| M      | Professional, scientific and technical activities   |
| N      | Administrative and support service activities   |
| O      | Public administration and defence; compulsory social security   |
| P      | Education   |
| Q      | Human health and social work activities   |
| R      | Arts, entertainment and recreation  |
| S      | Other service activities  |
| T      | Activities of households as employers; undifferentiated goods - and services - producing activities of households for own use |
| U      | Activities of extraterritorial organization and bodies  |

## 16. Status in employment

- Self Employed / with employees - are considered to be any person who works on its own account or with a small number of partners, on a continuous basis (including the reference period) have engaged one or more persons to work for him / her as an " employee ."
- Self Employed / without employees – are considered to be any person who works on its own account has a status as " self-employed ", and who on continuing basis not engage " employees " ( for example, bricklayers, painters, nurses, people who gives private lessons ).
- Employed / a – are considered to be any person who works for a public or private employer and who receives money or in-kind compensation for his/her business.
- Family worker – are considered to be any person who works as a family worker . The group of family workers are persons who without any charge assist family members in the operation or management of :
  - Business units (companies, firms, shops) owned by a household member or
  - An individual agricultural holdings.

In the fields provided, enter code any of the answers.

If the answers are 1, 2, 4 move to question 19. If the answer is 3 move to the next question.

**Pay attention to "jump".**

## 17. Sector of employed person

- For all household members aged 15 years and over there is entered the possible answers in the column of codes of that household member. For public sector - government sector for example education, health and so on, public enterprises and enterprises of state property enter code 1. For private sector enter code 2.

## 18. What type of work contract you have?

If a person has a contract for an indefinite period enter code 1, and if a person has contract for a limited time enter code 2 in column codes of that household member.

#### 19. Hours worked by employed person

A person who works full time, enter code 1, and if it does work less than full time enter code 2 in column code of that household member.

Full - time is considered by the law prescribed working hours for the type of activity or work that surveyed person performs. If a person performs the activity at home and work for the same number of hours, as well as persons the same or similar work performed by the employed, its considered that a person works full- time. If that person works fewer hours than person of the same or similar work performed by the employed, its considered that a person works full time less than full. Persons who are not legally established working hours is considered that they work full- time if they work 30 or more hours per week (farmers, helping members, self-employed as a professional activity, which is not prescribed length of time).

#### 20. Generated additional income (of household members)

- Generated additional income refers to 12 months passed before the interview period. On the basis of respondents' answers, an appropriate modality is to be circled.

**Small business** covers non-registered small-scope jobs (e.g. forest fruit collection, resale of staff, collection of paper, handicraft, etc.).

**Other** covers all those not specified elsewhere (e.g. renting room, dwelling, business premises, etc.).

If a member of the household did not generated additional income, then there should be entered 1 in appropriate column (under the code of a member).

#### 21. Number of months of work (done by household members)

- For every respondent, there should be entered the total number of months of work for 12 months passed before the interview period. There should be included unpaid leave, vacation, and sick-leave. Members without any month of work are entered with 0, and other household members are entered with the appropriate number from 1 to 12.

22. Were you actively searching a job in last **4 weeks**?

If the answer is YES enter code 1 and if the answer is NO enter code 2.

23. Are you available to start with job and work within 2 weeks if you are offered appropriate job?

If the answer is YES there is entered code 1 and if the answer is NO there is entered code 2.

24. Main source of household income

- Main source of household income is one which generates the highest amount of money. Of the provided modalities, only one answer is circled. If the interviewer has circled the code 7, he/she should describe main source of income (text explanation).

**Earnings in public sector** – refer to the earnings in the government sector (e.g. education, health, etc.), in public enterprises and sector of state property.

**Earnings in private sector** – refer to the earnings in the sector of private property.

**Agriculture** – earnings in the area of agriculture.

**Business households** – earnings from unregistered business households (handicraft, etc.)

**Pensions** – earnings based on pension and disability insurance.

**Transfers/transactions** – is the transfer within which one institutional unit supplies other institutional unit with goods, services or property, and not receiving goods, services or property in return from this unit (gifts). Transfer in kind comprises grant transfer of ownership over goods or property (money is excluded) or insurance of services without charges. **Transaction** is the economic flow between institutional units based on the contract or the activity of an institution unit which is useful to consider it in the analytical terms as the transaction, because the unit often deals with two different roles.

**Other** – all other not specified elsewhere.

25. Monthly income of household and monthly needs of household

- Subjective question with only one modality is to be circled. The data will serve in analysing the living standards of households, and thus it is necessary to receive as accurate as possible data.



26. Necessary minimal income of households
- Subjective question to be entered with the cash amount in euro.
27. Comparing the current financial situation of household with the situation a year ago
- Subjective question with only one modality is to be circled. The data will serve in analysing the living standards of households, and thus it is important to receive as accurate as possible data.

### **Household and business (job)**

28. Household and business
- Only one modality is to be circled. The data will serve for understanding the logical link between this question and other questions, and for analytical purposes.
29. Business (registered and unregistered)
- If the business (job) registered, then there is circled 1, and if not then 2 is circled.
30. Business unregistered
- If the question 18 is answered with circled code 2, then the type of job should be entered. The data serves for the analysis of expenditures for the types of business entered in the diary. It is necessary to obtain accurate data which will be used for calculating and for analytical purposes.

The last page of questionnaire (P-1) should be entered with the note and suggestions from the interviewer. The interviewer gives his/her impression get during the interviewing the household. Since these impressions are important for assessing the success of survey, the interviewers should put efforts to give their opinion as objective as possible. Additionally, the interviewer also enters here notes referring to the difficulties encountered when he/she classified individual answers and obtained data under rules of this guideline, and referring to the incompleteness of the guideline.

**The interviewer who conducted the interviewing must enter his/her name and surname. Additionally, the person who checked the data should enter his/her name and surname.**

### **2.3. Guideline for filling questionnaire P-2**

Questionnaire is filled for a month period. The interviewer enters (in the envisaged field) day and hour of visit to the household (the data are used in the control phase). The interviewer copies name and surname of controller, as well as phone number (in the envisaged field) from the form D-1 to the form P-2.

#### **Identification data**

**Code of survey** - entered in the questionnaire.

**Code of questionnaire** - entered in the questionnaire.

**Code of region** - is copied from the list of selected households (address list).

**Municipality** - is copied from the list of selected households (address list).

**Settlement** - is copied from the list of selected households (address list).

**Code of enumeration area** - is copied from the list of selected households (address list).

**Stratum** - is copied from the list of selected households (address list).

**Month and year** – the first two fields are entered with month, and the rest two fields are entered with the last two numbers in year (e.g. 03 2005 – there is entered 0305).

**Ordinal number of selected households in enumeration area** - is copied from the list of selected households (there is entered the number from the address list, from column Ordinal number).

## Housing

### 1. Basis for using the dwelling

- The interviewer should define the basis for using the dwelling and circle appropriate modality according to the housing status of the head of household or other household members. If son or daughter of the owner of dwelling lives alone in the dwelling (house) whose owner is one of parents, the interviewer should circle code 1. If two households live in the dwelling whose members are co-owners of that dwelling, the interviewer circles the code 1 for both households. If household members live in the dwelling (part of dwelling) free of charge (they do not pay any rent), in return for certain services provided to owners of dwelling or persons paying the housing costs, the interviewer should circle the code 6.

## Type of housing unit

**Dwelling** - is a connected unit in constructing terms with purpose of housing consisted of one or more rooms, with appropriate additional premises: kitchen, pantry, lobby, bathroom, toilet, and similar), or without additional rooms, and it can have one or more separate entrances. However, dwelling is considered to be also housing units (rooms) not comprising a construction unit with the additional premises.

**Non-housing premises** – premises, whose main purpose is not for housing (e.g. garage, shed, attic, etc.), but due to the lack of housing unit, they are used for housing.

**Room - premise** is the premise intended for living which is separated by permanent wall from other dwelling rooms, with daily light and at least 6m<sup>2</sup> of floor area. The number of rooms also covers the premise separated from the main premises of dwelling (streets or yards). The number of rooms includes also corridor room if it has the daily lights and with the at least 6m<sup>2</sup> floor area. A room with the floor area less than 6m<sup>2</sup> is not counted in the total number of rooms, but its area is included in the total dwelling area.

## **Basis for using dwelling**

**Owner of dwelling (house)** – one of household members that lives in the dwelling and is owner or co-owner of dwelling based on the documentation on the right of ownership over the dwelling (house).

**Occupant of dwelling owned by state** – occupants that did not buy the dwelling in which they reside (the dwelling can be or cannot be bought) and they pay the rent.

**Occupant of dwelling privately owned (whole dwelling)** – when one of household members that lives in the dwelling possesses decision, agreement or oral agreement on payment of rent.

**Occupant of dwelling privately owned (a part of dwelling)** – occupants that rented a part of dwelling privately owned to live in the dwelling, and they pay rent for using it.

**Family relationship (he/she lives at parents, children or other relatives' place)** - household members that live in the dwelling (house) with relatives.

**Other** – all that is not classified elsewhere.

### 2. Dwelling area (only for housing – principle of residence)

- The interviewer enters the total area of dwelling only used by the household. If the household lives in a dividable dwelling, the interviewer should enter the total sum of calculated area of rooms only used by the household and calculated room areas used by the household together with other households (e.g. kitchen and bathroom used together by households, with the total area of 18 m<sup>2</sup>, the interviewer will calculate 9 m<sup>2</sup>). The data on the dwelling area is entered by the interviewer using round number in square metres.

### 3. Amount of rent for a month (for the household members living in the rented out dwelling)

- The interviewer enters the cash amount of rent for the dwelling based on the respondent's statement.

### 4. Imputed rent (for household members living in their own or free of charge dwelling)

- The interviewer enters the estimated value of rent for the household living in their own dwelling (respondent's statement). The respondent should provide a realistic amount of

monthly rent which is paid for renting the dwelling similar to their dwelling. The aim is to obtain as real as possible amount of monthly rent for the dwelling used, i.e. imputed rent for similar rented dwelling. The data on imputed rent serve for analytical purposes (e.g. observing the living standards of different household categories considering the basis for using the dwelling, having as a result the unequal effects on monetary flows).

5. Type of dwelling (dwelling as construction unit)

- The interviewer should circle an appropriate code depending on the type of dwelling in which the household lives.

**Special room** – one room without kitchen and bathroom, possible with lobby, toilet or pantry, if the area of all additional premises is less than 6 m<sup>2</sup>.

**Bachelor flat** – dwelling with one room, bathroom and lobby with kitchen less than 4 m<sup>2</sup> (kitchenette) or without it.

**One-room dwelling** – can be the dwelling with one room, kitchen and other additional rooms, or a room without kitchen but with other additional rooms with 6m<sup>2</sup> floor area and over.

**Two-room, three-room dwelling or dwelling with more rooms** – dwelling with two, three or more rooms, with additional rooms or without them. Dwellings may have kitchen or to be without it.

**Non-housing premise** – premise whose main purpose is not for housing (e.g. cellar, attic, business premises, etc.), but which is used for housing due to the lack of dwelling.

6. Year of constructing dwelling (house)

- The interviewer should enter as accurate as possible the data. If there is no accurate data, the recommendation is to determine the year of constructing the dwelling by using the intervals, as the following: until 1945; 1946-1960; 1961-1980; 1981-1995 and since 1996. Based on the obtained data, the comparison will be done with the data regarding housing.

7. Dwelling (house) and installations

- Respondent provides the answer on the installations in the dwelling or in the part of dwelling used by the household. The interviewer should circle appropriate codes for all installations used by the household. If there are available water supply installations in the dwelling, regardless of the number of flow places in the dwelling and no matter if the dwelling is supplied with water from the public water supply or using own hydrophore, the interviewer should enter the code 1. If the sewage installations are available in the dwelling for the waste water piping, regardless of the connection with public sewage network or septic tank, etc., the interviewer should enter the code 2. If the dwelling possesses electricity installations, no matter if they are built in the walls or put outside on the walls (no matter if they are connected to outer electricity network or not), the interviewer should enter the code 3. If the dwelling or part of the dwelling is heated with built-in steam or water heating installations, etc. (from heating plant, central heating or separate boiler-room), the interviewer enters the code 4. The interviewer enters the code 5 only if the phone in the dwelling is connected to the appropriate switching office.

#### 8. Dwelling and rooms

- The interviewer enters appropriate codes based on the respondent's statement. If there is a room with bath tub and shower in the dwelling (or with the first one or with the second one mentioned), and installations are not connected to the public or home water supply system, the interviewer should enter the code 2. If there is a kitchenette in the dwelling (kitchen less than 4 m<sup>2</sup>), the interviewer enters the code 1. If the garage is close to the place of living, so that it can be used every day, the interviewer enters the code 4.

#### 9. Number of rooms in the dwelling (house), in addition to kitchen and bathroom (residence principle)

- The number of rooms covers bedrooms, living rooms, non-housing rooms (premises not purposed for housing, but due to the lack of housing unit they are used for housing), with the floor area of 6 m<sup>2</sup>. Corridors, kitchenette, lobbies, premises for other purposes (boiler-room, laundry-room, cellars, etc.) are not considered to be rooms.

10. Heating in the dwelling (house)

- The interviewer should circle only one code, based on the respondent's statement.

11. Heating or cooking using the firewood from own production

- If the household uses the firewood from its own production for heating/cooking, the value of spent quantity should be entered (for previous 12 months).

12. Possessing other facilities/building

- Based on the respondent's statement, the interviewer should circle an appropriate code and to enter the area of facilities/building.

From 13 to 18. Distance of dwelling (house) from certain institutions

- The interviewer together with the respondent should define as accurate as possible data on distance between household and mentioned institutions. The data are used in observing housing conditions of households.

**Durable consumer goods available in household**

From 20 to 51. Possession of the durable consumer goods (only valid goods)

- The interviewer enters the number of valid goods after every durable goods, regardless if they are owned by the household or the household uses the obtained goods as a component part of the dwelling/house (e.g. refrigerator, boiler, etc.). The total number (pieces) of durable goods should also cover durable goods used by the household within the dwelling for leisure and recreation. The interviewer does not enter the data on durable goods used together by several households. The data serve for analytical purposes (availability of durable consumer goods).

## **Data on holding's elements**

### 52. Agricultural land (possession)

- The interviewer enters the total area of arable and non-arable land in ares. 1 hectare is 100 ares; 1 acre is 0,57 hectares (and local area measurement units, such as: 1 lanac - 0,72 hectares; 1 dulum - 0,1 hectare, i.e. 10 ares); 1 plow - 0,1 hectare, i.e. 10 ares.

### 53. Arable land (possession)

- The interviewer enters the total area of arable land in ares.

### From 54 to 61. Data on number of livestock, poultry and beehives (possession)

- The interviewer enters the total number (heads) of livestock (for individual type), poultry and beehives.

### From 62 to 66. Agricultural tools (possession)

- The interviewer enters the number (pieces) of agricultural tools in the possession of the household.

**Used resources** of household are given in the following groups of COICOP classification (four-month level): clothes and footwear; housing, water, electricity, gas and other fuels; furniture, household furnishing and maintenance; health; transport; communication; recreation and culture; education; restaurants and hotels; and other goods and services.

### **Cash expenditures (purchase) for semi durable goods in previous 3 months (compared with the beginning of interview period)**

If the semi durable goods are purchased on loan in previous three months, the interviewer enters the total cash amount (not cash instalments).

### From 67 to 76 Clothes and footwear (costs in previous three months)

- The interviewer enters (in euro with cents) costs of households for the purchase of clothes and footwear.



77. Actual rents (costs in previous three months)

- The interviewer enters the cash amounts of rent for the dwelling reported by the respondent. The interviewer should check the logic of data comparing with the data obtained as the answer to the question 3, and eventually to ask for additional explanation.

78. Imputed rent (costs in previous three months; the interviewer enters them without asking the household)

- In case that the household resides in its own dwelling – the amount of estimated average market value is entered for renting the dwelling in which this household resides. In other words, there is entered the amount for the dwelling which could be the rented out to a household in the mentioned conditions.

From 79 to 90 Housing, water, electricity, gas, and other fuels (costs in previous three months)

- The interviewer should copy all costs from the receipts (bills) for all items spent by the household (e.g. costs for spent water, electricity, central heating, etc.).

From 91 to 94 Costs of vehicle use and maintenance (costs in previous three months)

- The interviewer should together with the respondent to define as precise as possible all mentioned expenditure under group from 91 to 94 (e.g. for entering the costs of household for petrol, the interviewer should define how many times the vehicle is used, then monthly mileage and spent petrol. Considering that the three-month amount should be entered, the monthly amount is multiplied with 3.

From 95 to 96 Services of paid personnel and home services (costs in previous three months)

- The interviewer enters the costs of household for services of personnel and home services (e.g. baby-sitting, window washing, etc.)

From 97 to 99 Goods and services for routine maintenance of dwelling (costs in previous three months)

- The interviewer enters all costs of households for goods and services used for routine maintenance of dwelling.

From 100 to 101 Communication (costs in previous three months)

- The interviewer enters all costs related to the communication. The interviewer must enter all cash amounts from the bill for all items spent by the household (e.g. phone impulses).

From 102 to 111. Health (costs in previous three months)

- The interviewer enters all classified costs related to the health. The interviewer should enter cash amounts from the receipt for all items spent by household (e.g. participation costs for medicaments). All costs related to the health, excluding costs reimbursed through the Health Insurance Fund.

From 112 to 121. Transport services (costs in previous three months)

- The interviewer enters all costs related to the transport services. The interviewer should have in mind the transport costs for arriving to and departing from the working place.

From 122 to 134. Education (payments and similar; costs in previous three months)

- The interviewer should enter costs for education of household members. The attention should be paid to question 134 – costs for all types of education, for ex. costs for foreign language courses, costs for training to use computer, etc. Costs for preschool education are only considered to be this category and not costs of preschool stay in kindergarten.

From 135 to 149. Culture and recreation (costs in previous three months)

- The interviewer enters costs of household for culture and recreation (special attention should be paid for questions 136, 139, 141, 144 and 145, because these are the most often costs).

From 150 to 153. Hotels, cafés and restaurants (costs in previous three months)

- The interviewer enters household's costs related to food in restaurants (e.g. lunch), canteens, kiosks, etc. The attention should be paid to question 153 under which the accommodation costs are entered.

From 154 to 159. Other goods and services (costs in previous three months)

- The interviewer enters the costs related to the personal services (hairdressing, beauty care, etc.), purchase or repair of electrical appliances for personal care, etc. (the attention should be paid to the households' costs for soaps, shampoos, etc.).

From 160 to 169. Social protection and insurance (costs in previous three months)

- The interviewer should pay the attention to questions related to the insurance costs (No 162; 163; 164; 165 and 166), because the data are important for further calculations and users.

The interviewer should enter **final total costs** in appropriate column (euro with cents) for semi durable goods in previous 3 months (**compared with the beginning of interview period**).

The interviewer should enter his/her comments and suggestions on the last page of questionnaire (P-2). **The interviewer who performs the surveying must enter his/her name and surname. This relates also to the person who checked the data.**

## 2.4. Guideline for filling questionnaire P-3

**Identification data in form P-3 are copied from forms P-1 and P-2.**

Cash costs for the purchase of durable goods in previous 12 months (**compared with the beginning of interview period**)

From 1. to 33. Durable goods (in previous 12 months compared to the interview period)

- The interviewer enters costs of household for furniture and floor coverings; home appliances; glassware, cutlery and supplies; tools and equipment for house and garden; culture and recreation and transport.

The interviewer should make a difference between groups for durable and semi durable goods. Special attention should be paid to questions 4, 12, 13, 15, 16 and 17, because these are the most often costs of households during the year.

The interviewer should enter **the total costs** for purchasing durable goods in the appropriate column (in euro with cents). **Income and expenditures of households engaged in agriculture, hunting and fishery (in previous month compared with the beginning of interview period)**

From 34 to 46. Income from products and food from own production (in previous month)

- The interviewer enters cash amounts of the purchase of products and food.

From 47 to 61. Expenses of household engaged in agriculture, hunting, and fishery

- The interviewer must pay a special attention to the costs regarding questions 49, 50, 54 and 57. Description should be given for question 61, “other expenses“.

### **Income (transfers) in previous month**

This table collects the data on the total resources available in the household for previous month. The interviewer should define which household members generated the income in previous month and record them under appropriate column (the code of household member should be entered in the box with the name ‘number’).

### **62. Regular and irregular income from employment**

- The interviewer enters all regular and occasional income from the employment (regardless if a member of the household that generated the income is permanent employed). The allowance for working in a place different to the place of residence is included here.

63. Money receipts (from employment)

- The interviewer enters: cash amount received for over-time work, premiums, awards, money remained after business trips, transport costs – remunerations, etc.

64. Cash income of household members who temporary or constantly work based on temporary working contract

- The interviewer enters the cash amount generated on the basis of temporary working contract.

65 and 66. Social welfare and health insurance based income

- The interviewer enters the amount of cash payment for the mentioned based on social insurance, and benefits from health insurance for sick-leave and maternity leave.

67. Pensions

- The interviewer enters cash amounts for all types of pensions.

68. Disability

- The interviewer enters all payments for disability.

69, 70 and 71. Child allowance, alimentation and scholarship

- The interviewer enters cash amount for child allowance, alimentation, and scholarship for pupils and students. Awards received by pupils and students are included.

72. Renting (real estate renting)

- The interviewer enters the net cash amount for renting the property by household member who is the owner.

73. Interest

- Monthly interest performed should be entered here.

74. Gifts and money rewards

- The cash amount of received gifts should be entered (e.g. for weddings, birthdays, holidays, etc.), as well as amounts of different rewards from the games of chance, betting, etc.

75. Income from stocks

- Amounts from the purchase of securities should be entered as well as amount of dividends obtained on the basis of ownership over stocks.

76. Income from abroad

- Amount received on the basis of money gifts from abroad, assistance, heritage, etc.

77. Remunerations from nationalized property

- The interviewer enters the amount received as the compensation for property which became the state owned.

78. Cash benefits for unemployed persons or temporary unemployed persons

- Here should be entered the cash amount received under the social assistance allowance for unemployed or temporarily unemployed persons.

79 and 80. Income from life and property insurance

- The amount from the life insurance and insurance for persons' property.

81. Benefits in kind instead of salaries

- The cash amount of all income in kind on the basis of earnings (e.g. food, clothes, products for personal care, etc.)

82. i 83. Donation (in cash and in kind)

- The value of donation received from government and non-government organizations in the country and abroad.

84. Loans/borrowings

- There should be entered the returned money which was previously borrowed by the household to other persons (out of own household).

85. Raising savings, borrowings from natural persons, and from the collective enterprise fund.

- Cash amounts of savings; money borrowed from natural persons and from the collective enterprise fund should be here entered. The interest should be excluded, since it is included in the question 73.

86. and 87. Net income of households from agriculture, hunting and fishery and small business

- The cash amount of all income generated from agriculture, hunting, fishery and small business.

88. Other income (loans, etc.)

- The interviewer enters the value of other income generated by the household (loans raised, etc.).

## **2.5. Guideline for filling questionnaire for non-response (NO-4)**

**Identification data in form NO-4 are copied from the form P-1.**

### **Questionnaire for non-response**

1. Reason why the survey is not conducted

- The interviewer should circle the code which refers to the realistic situation in the field (e.g. if the mentioned address does not exist on the field, the code 1 is to be circled.)

2. Reason why the household refused to participate in the survey

- The interviewer should circle the code which corresponds to the real situation (e.g. if the household does not have time although the interviewer put efforts to persuade the household to cooperate, the interviewer will circle the code 1.)

3. Reason of absence of household

- The interviewer should circle an appropriate code (e.g. if the household is abroad, the code 1 will be circled.)

The interviewer should enter his/her notes and suggestions on the last page of questionnaire (NO-4). **The interviewer who conducted the survey must enter his/her name and surname. Additionally, a person who checked the data should enter his/her name and surname.**