FINAL QUALITY REPORT

EU-SILC 2005 OPERATION
POLAND

Warsaw, December 2007

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1. COMMON CROSS-SECTIONAL EUROPEAN UNION INDICATORS

Common cross-sectional EU indicators based on the cross-sectional component of EU-SILC 2005 (old child definition)

	Indicator	Value
1	At-risk-of-poverty rate after social transfers - total	**21**
2	At-risk-of-poverty rate after social transfers - men total	**21**
3	At-risk-of-poverty rate after social transfers - women total	**20**
4	At-risk-of-poverty rate after social transfers - 0-15 years	**29**
5	At-risk-of-poverty rate after social transfers - 16-24 years	**26**
6	At-risk-of-poverty rate after social transfers - 25-49 years	**21**
7	At-risk-of-poverty rate after social transfers - 50-64 years	**16**
8	At-risk-of-poverty rate after social transfers - 65+ years	**7**
9	At-risk-of-poverty rate after social transfers - 16+ years	**19**
10	At-risk-of-poverty rate after social transfers - 16-64 years	**21**
11	At-risk-of-poverty rate after social transfers - 0-64 years	**23**
12	At-risk-of-poverty rate after social transfers - men 16-24 years	**25**
13	At-risk-of-poverty rate after social transfers - men 25-49 years	**22**
14	At-risk-of-poverty rate after social transfers - men 50-64 years	**19**
15	At-risk-of-poverty rate after social transfers - men 65+ years	**5**
16	At-risk-of-poverty rate after social transfers - men 16+ years	**20**
17	At-risk-of-poverty rate after social transfers - men 16-64 years	**22**
18	At-risk-of-poverty rate after social transfers - men 0-64 years	**23**
19	At-risk-of-poverty rate after social transfers - women 16-24 years	**27**
20	At-risk-of-poverty rate after social transfers - women 25-49 years	**21**
21	At-risk-of-poverty rate after social transfers - women 50-64 years	**14**
22	At-risk-of-poverty rate after social transfers - women 65+ years	**9**
23	At-risk-of-poverty rate after social transfers - women 16+ years	**18**
24	At-risk-of-poverty rate after social transfers - women 16-64 years	**20**
25	At-risk-of-poverty rate after social transfers - women 0-64 years	**22**
26	At-risk-of-poverty rate after social transfers - employed	**14**
27	At-risk-of-poverty rate after social transfers - unemployed	**46**
28	At-risk-of-poverty rate after social transfers - retired	**11**
29	At-risk-of-poverty rate after social transfers - other inactive	**27**
30	At-risk-of-poverty rate after social transfers - men, employed	**15**
31	At-risk-of-poverty rate after social transfers - men, unemployed	**48**
32	At-risk-of-poverty rate after social transfers - men, retired	**11**
33	At-risk-of-poverty rate after social transfers - men, other inactive	**26**
34	At-risk-of-poverty rate after social transfers - women, employed	**12**
35	At-risk-of-poverty rate after social transfers - women, unemployed	**43**
36	At-risk-of-poverty rate after social transfers - women, retired	**10**
37	At-risk-of-poverty rate after social transfers - women, other inactive	**27**

	Indicator	Value
38	At-risk-of-poverty rate after social transfers - single, < 65 years	**26**
39	At-risk-of-poverty rate after social transfers - single, 65+ years	**7**
40	At-risk-of-poverty rate after social transfers - single, male	**25**
41	At-risk-of-poverty rate after social transfers - single, female	**12**
42	At-risk-of-poverty rate after social transfers - single, total	**17**
43	At-risk-of-poverty rate after social transfers - 2 adults, no children, both < 65	**14**
44	At-risk-of-poverty rate after social transfers - 2 adults, no children, at least one 65+	**6**
45	At-risk-of-poverty rate after social transfers - other households without children	**14**
46	At-risk-of-poverty rate after social transfers - single parent, at least one child	**39**
47	At-risk-of-poverty rate after social transfers - 2 adults, 1 child	**17**
48	At-risk-of-poverty rate after social transfers - 2 adults, 2 children	**23**
49	At-risk-of-poverty rate after social transfers - 2 adults, 3+ children	**45**
50	At-risk-of-poverty rate after social transfers - other households with children	**22**
51	At-risk-of-poverty rate after social transfers - households without children	**13**
52	At-risk-of-poverty rate after social transfers - households with children	**25**
53	At-risk-of-poverty rate after social transfers - owner or rent-free	**20**
54	At-risk-of-poverty rate after social transfers – tenant	**25**
55	At-risk-of-poverty rate after social transfers - households without children, w = 0	**24**
56	At-risk-of-poverty rate after social transfers - households without children, 0 < w < 1	**14**
57	At-risk-of-poverty rate after social transfers - households without children, w = 1	**8**
58	At-risk-of-poverty rate after social transfers - households with children, w = 0	**62**
59	At-risk-of-poverty rate after social transfers - households with children, 0 < w < 0.5	**43**
60	At-risk-of-poverty rate after social transfers - households with children, 0.5 < w < 1	**22**
61	At-risk-of-poverty rate after social transfers - households with children, w = 1	**15**
62	Median of the equivalised disposable household income	**11467 PLN**
63	At-risk-of-poverty threshold - single	**6880 PLN**
64	At-risk-of-poverty threshold - 2 adults, 2 children	**14448 PLN**
65	Inequality of income distribution S80/S20 income quintile share ratio	**6.6**
66	Relative median at-risk-of-poverty gap – total	**30**
67	Relative median at-risk-of-poverty gap - men total	**31**
68	Relative median at-risk-of-poverty gap - women total	**30**
69	Relative median at-risk-of-poverty gap - 0-15 years	**32**
70	Relative median at-risk-of-poverty gap - 16-64 years	**30**
71	Relative median at-risk-of-poverty gap - 65+ years	**17**
72	Relative median at-risk-of-poverty gap - 16+ years	**29**
73	Relative median at-risk-of-poverty gap - men, 16-64 years	**31**
74	Relative median at-risk-of-poverty gap - men, 65+ years	**19**
75	Relative median at-risk-of-poverty gap - men, 16+ years	**30**
76	Relative median at-risk-of-poverty gap - women, 16-64 years	**30**
77	Relative median at-risk-of-poverty gap - women, 65+ years	**16**
78	Relative median at-risk-of-poverty gap - women, 16+ years	**29**

	Indicator	Value
79	Dispersion around the risk-of-poverty threshold - 40%	**9**
80	Dispersion around the risk-of-poverty threshold - 50%	**15**
81	Dispersion around the risk-of-poverty threshold - 70%	**28**
	Before social transfers except old-age and survivors' benefits	
82	At-risk-of-poverty rate before social transfers – total	**30**
83	At-risk-of-poverty rate before social transfers - men total	**31**
84	At-risk-of-poverty rate before social transfers - women total	**29**
85	At-risk-of-poverty rate before social transfers - 0-15 years	**39**
86	At-risk-of-poverty rate before social transfers - 16-64 years	**31**
87	At-risk-of-poverty rate before social transfers - 65+ years	**11**
88	At-risk-of-poverty rate before social transfers - 16+ years	**28**
89	At-risk-of-poverty rate before social transfers - men, 16-64 years	**32**
90	At-risk-of-poverty rate before social transfers - men, 65+ years	**8**
91	At-risk-of-poverty rate before social transfers - men, 16+ years	**29**
92	At-risk-of-poverty rate before social transfers - women, 16-64 years	**30**
93	At-risk-of-poverty rate before social transfers - women, 65+ years	**13**
94	At-risk-of-poverty rate before social transfers - women, 16+ years	**27**
	Before social transfers including old-age and survivors' benefits	
95	At-risk-of-poverty rate before social transfers – total	**51**
96	At-risk-of-poverty rate before social transfers - men total	**49**
97	At-risk-of-poverty rate before social transfers - women total	**52**
98	At-risk-of-poverty rate before social transfers - 0-15 years	**45**
99	At-risk-of-poverty rate before social transfers - 16-64 years	**45**
100	At-risk-of-poverty rate before social transfers - 65+ years	**88**
101	At-risk-of-poverty rate before social transfers - 16+ years	**52**
102	At-risk-of-poverty rate before social transfers - men, 16-64 years	**45**
103	At-risk-of-poverty rate before social transfers - men, 65+ years	**88**
104	At-risk-of-poverty rate before social transfers - men, 16+ years	**50**
105	At-risk-of-poverty rate before social transfers - women, 16-64 years	**45**
106	At-risk-of-poverty rate before social transfers - women, 65+ years	**88**
107	At-risk-of-poverty rate before social transfers - women, 16+ years	**53**
108	Gini coefficient	**36**
109	Mean equivalised disposable income	**13761 PLN**

Selected cross-sectional EU indicators based on the cross-sectional component of EU-SILC 2005 (new child definition)

	Indicator	Value
1	At-risk-of-poverty rate after social transfers - total	**21**
2	At-risk-of-poverty rate after social transfers - men total	**21**
3	At-risk-of-poverty rate after social transfers - women total	**20**
4	At-risk-of-poverty rate after social transfers - 0-17 years	**29**
5	At-risk-of-poverty rate after social transfers - 18-24 years	**25**
6	At-risk-of-poverty rate after social transfers - 25-49 years	**21**
7	At-risk-of-poverty rate after social transfers - 50-64 years	**16**
8	At-risk-of-poverty rate after social transfers - 65+ years	**7**
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16	At-risk-of-poverty rate after social transfers - men 18-64 years	**21**
17	At-risk-of-poverty rate after social transfers - women 18-24 years	**26**
18	At-risk-of-poverty rate after social transfers - women 25-49 years	**21**
19	At-risk-of-poverty rate after social transfers - women 50-64 years	**14**
20	At-risk-of-poverty rate after social transfers - women 65+ years	**9**
21	At-risk-of-poverty rate after social transfers - women 18+ years	**17**
22	At-risk-of-poverty rate after social transfers - women 18-64 years	**20**
23	At-risk-of-poverty rate after social transfers - employment	**14**
24	At-risk-of-poverty rate after social transfers - unemployment	**46**
25	At-risk-of-poverty rate after social transfers - retired	**11**
26	At-risk-of-poverty rate after social transfers - other inactive	**26**
27	At-risk-of-poverty rate after social transfers - men, employment	**15**
28	At-risk-of-poverty rate after social transfers - men, unemployment	**48**
29	At-risk-of-poverty rate after social transfers - men, retired	**11**
30	At-risk-of-poverty rate after social transfers - men, other inactive	**25**
31	At-risk-of-poverty rate after social transfers - women, employment	**12**
32	At-risk-of-poverty rate after social transfers - women, unemployment	**43**
33	At-risk-of-poverty rate after social transfers - women, retired	**10**
34	At-risk-of-poverty rate after social transfers - women, other inactive	**27**
35	At-risk-of-poverty rate after social transfers - single, < 65 years	**26**
36	At-risk-of-poverty rate after social transfers - single, 65+ years	**7**
37	At-risk-of-poverty rate after social transfers - single, male	**25**
38	At-risk-of-poverty rate after social transfers - single, female	**12**
39	At-risk-of-poverty rate after social transfers - single, total	**16**
40	At-risk-of-poverty rate after social transfers - 2 adults, no children, both < 65	**14**
41	At-risk-of-poverty rate after social transfers - 2 adults, no children, at least one 65+	**6**
42	At-risk-of-poverty rate after social transfers - other households without children	**14**
43	At-risk-of-poverty rate after social transfers - single parent, at least one child	**40**
44	At-risk-of-poverty rate after social transfers - 2 adults, 1 child	**17**

	Indicator	Value
45	At-risk-of-poverty rate after social transfers - 2 adults, 2 children	**23**
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48	At-risk-of-poverty rate after social transfers - households without children	**13**
49	At-risk-of-poverty rate after social transfers - households with children	**25**
50	Relative median at-risk-of-poverty gap – total	**30**
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53	Relative median at-risk-of-poverty gap - 0-17 years	**33**
54	Relative median at-risk-of-poverty gap - 18-64 years	**30**
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56	Relative median at-risk-of-poverty gap - 18+ years	**29**
57	Relative median at-risk-of-poverty gap - men, 18-64 years	**31**
58	Relative median at-risk-of-poverty gap - men, 65+ years	**19**
59	Relative median at-risk-of-poverty gap - men, 18+ years	**30**
60	Relative median at-risk-of-poverty gap - women, 18-64 years	**30**
61	Relative median at-risk-of-poverty gap - women, 65+ years	**16**
62	Relative median at-risk-of-poverty gap - women, 18+ years	**28**
	Before social transfers except old-age and survivors' benefits	
63	At-risk-of-poverty rate before social transfers – total	**30**
64	At-risk-of-poverty rate before social transfers - men total	**31**
65	At-risk-of-poverty rate before social transfers - women total	**29**
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75	At-risk-of-poverty rate before social transfers - women, 18+ years	**26**
	Before social transfers including old-age and survivors' benefits	
76	At-risk-of-poverty rate before social transfers – total	**51**
77	At-risk-of-poverty rate before social transfers - men total	**49**
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79	At-risk-of-poverty rate before social transfers - 0-17 years	**46**
80	At-risk-of-poverty rate before social transfers - 18-64 years	**45**
81	At-risk-of-poverty rate before social transfers - 65+ years	**88**
82	At-risk-of-poverty rate before social transfers - 18+ years	**52**
83	At-risk-of-poverty rate before social transfers - men, 18-64 years	**45**
84	At-risk-of-poverty rate before social transfers - men, 65+ years	**88**
85	At-risk-of-poverty rate before social transfers - men, 18+ years	**51**
86	At-risk-of-poverty rate before social transfers - women, 18-64 years	**45**
87	At-risk-of-poverty rate before social transfers - women, 65+ years	**88**
88	At-risk-of-poverty rate before social transfers - women, 18+ years	**54**

2. ACCURACY

2.1. Sample design

Type of sampling design

The two-stage sampling scheme with different selection probabilities at the first stage was used. Prior to selection, sampling units were stratified.

Sampling units

The first-stage sampling units (primary sampling units - PSU) were enumeration census areas, while at the second stage dwellings were selected. All the households from the selected dwellings are supposed to enter the survey.

Stratification and substratification

The strata were the voivodships (NUTS2), while within voivodships primary sampling units were classified by class of locality. In urban areas census areas were grouped by size of town, but in the five largest cities districts were treated as strata. In rural areas strata were represented by rural gminas (NUTS5) of a subregion (NUTS3) or of a few neighbouring poviats (NUTS4). Altogether 211 strata were distinguished.

Sample size and allocation criteria

It was decided that the sample should include some 24 000 dwellings[1]. Proportional allocation of dwellings to particular strata was applied. The number of dwellings selected from a particular stratum was in proportion to the population number of dwellings in the stratum. Furthermore, the number of the first-stage units selected from the strata was obtained by dividing the number of dwellings in the sample by the number of dwellings determined for a given class of locality to be selected from the first-stage unit. In towns with over 100 000 population 3 dwellings per PSU were selected, in towns with 20-100 thousand population – 4 dwellings per PSU, in towns with less than 20 000 population – 5 dwellings per PSU, respectively. In rural areas 6 dwellings from each PSU were selected. Altogether 5912 census areas and 24044 dwellings were selected for the sample.

Sample selection schemes

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

[1] In 2005 the real gross sample size amounted to 24 thousand dwellings. It should be pointed out, however, that following Eurostat's decision the sample of 15000 households was adopted for the estimation of 2005 EU-SILC costs to be co-financed by the European Commission.

Renewal of sample: rotational groups

The selected sample of first-stage units was divided into four subsamples, equal in size. Starting from 2006 one of the subsamples is eliminated and replaced with another one, selected independently as described above.

Weightings

Design factor

Design factor – DB080 is equal to the dwelling sampling fraction reciprocal in the h-th stratum i.e.

$$f_h = \frac{n_h * m'_h}{M_h},$$

$$DB080 = \frac{1}{f_h}$$

where:
n_h - number of PSU selected from the h-th stratum,
m'_h - number of dwellings selected from PSU in the h-th stratum,
M_h – number of dwellings in the h-th stratum.

Non-response adjustments

DB080 weights were then adjusted with the use of completeness indicator, estimated for each class of locality separately:

Code of class of locality (p)	Class of locality	Completeness rate (cr_p)
	Poland	0.706
1	Warsaw	0.490
2	Towns 500 000 – 1 000 000 inhabitants	0.524
3	Towns 100 000 – 500 000 inhabitants	0.679
4	Towns 20 000 – 100 000 inhabitants	0.702
5	Towns less than 20 000 inhabitants	0.723
6	Rural areas	0.816

The adjusted weights were calculated according to the formula:

$$DB080_p^{corrected} = \frac{DB080_p}{cr_p}$$

Adjustments to external data

Using the integrated calibration method (in hyperbolic sinus version) weights were calculated for individuals and for households simultaneously. To do this the information about households was used (4 size categories: 1-person, 2-person, 3-person and 4- and more person households) and number of persons by age and gender (14 age groups: under 16, 16-19 years, then eleven 5-year groups, 75 years and over). This information at the level of NUTS2, additionally classified by urban/rural areas were derived from the 2002 Census and current demographic estimates.

Final longitudinal weight

Not applicable, since EU-SILC 2005 is the first wave of EU-SILC with the rotational design.

Final cross-sectional weight

In EU-SILC 2005 the following cross-sectional weights were calculated:

DB090 – weight for households,

RB050 – weight for all household members,

$RB050_{ij} = DB090_i$

where:
i – household number,
j – person number in the i-th household.

PB040 – weight for respondents at the age of 16 and over who had individual interview. This weight is obtained by the adjustment of RB050 separately in the groups according to gender and age in each voivodship according to urban and rural area,

PM005 – weight for people at the age of 25–65 years; PM005 = RB050,

RL070 – weight for children at the age of 0–12 years. It is obtained by the adjustment of RB050 weight in 26 groups, i.e. 13 years of birth and gender.

Substitutions

No substitution was applied if the household did not enter the survey.

2.2. Sampling errors

Standard error and effective sample size

Estimation of standard errors was based on resampling approach. We used a bootstrap method which resamples 200 times from each stratum $n_h - 1$ PSU's (primary sampling units) with replacement (McCarthy and Snowden method (1985)), where n_h denotes the sample size of PSU's in the *h*th stratum. After resampling the original weights were properly rescaled and bootstrap variance estimate of the corresponding indicator was obtained by the usual Monte Carlo approximation based on the independent bootstrap replicates. Computations were

carried out using SAS software. Additionally, we also implemented linearization method of variance estimation for main poverty indicators, and the results of comparisons with bootstrap method were very similar.

The mean, the total number of observations (before and after imputation) and the standard errors for the following income components (mean and standard errors based on weighted data while the number of observations based on unweighted results).

Income components	Mean[2]	Standard error	Mean[3]	Standard error	Number of observations	
					Before imputation	After imputation
Total household gross income (HY010)	33428	283	33243	279	6547	16190
Total disposable household income (HY020)	25672	203	25585	202	11015	16219
Total disposable household income before social transfers other than old-age and survivors benefits (HY022)	24081	202	23549	202	10954	15932
Total disposable household income including old-age and survivors benefits (HY023)	19391	239	16946	218	9862	14366
Net income components at household level						
HY040N	6884	769	92	12	189	210
HY050N	1716	33	361	9	3804	3936
HY060N	1195	67	52	4	720	745
HY070N	992	31	58	3	969	1001
HY080N	4389	188	262	17	827	927
HY090N	5323	1022	101	20	171	280
HY110N	2548	135	51	4	380	399
HY120N	219	5	100	3	6968	7738
HY130N	3382	145	182	10	813	855
HY140N	7897	93	7612	88	6585	15725
HY145N	-499	23	-235	11	7202	7785
Gross income components at household level						
HY040G	7691	928	103	15	189	210
HY050G	1750	35	368	9	3724	3936
HY060G	1195	67	52	4	720	745
HY070G	992	31	58	3	969	1001
HY080G	4389	188	262	17	827	927
HY090G	6441	1258	122	25	93	280
HY110G	2760	157	55	4	330	399
HY120G	219	5	100	3	6968	7738
HY130G	3382	145	182	10	813	855
HY140G	7610	95	7377	90	6585	15805

[2] Taking into account only households/persons receiving such income.
[3] Taking into account whole population (households/persons) surveyed.

Income components	Mean[2]	Standard error	Mean[3]	Standard error	Number of observations	
					Before imputation	After imputation
Net income components at personal level						
PY010N	15833	161	6098	78	11032	13628
PY020N	4072	449	25	4	41	185
PY035N	1691	49	70	3	1128	1371
PY050N	12362	475	955	43	1750	3001
PY080N	3063	860	1	0	6	14
PY090N	5075	122	200	8	1361	1467
PY100N	11613	70	2746	37	8445	9118
PY110N	7023	262	102	6	524	562
PY120N	2567	404	12	2	154	177
PY130N	6944	75	451	11	2391	2512
PY140N	1706	171	14	2	318	327
Gross income components at personal level						
PY010G	21719	225	8364	109	6065	13628
PY020G	4072	449	25	4	41	185
PY035G	1691	49	70	3	1128	1371
PY050G	15736	581	1427	62	1785	3581
PY080G	4006	1133	2	0	3	14
PY090G	5808	144	229	9	792	1467
PY100G	13434	83	3177	43	5833	9118
PY110G	8020	304	117	7	323	562
PY120G	3053	482	14	2	26	177
PY130G	7894	88	512	13	1626	2512
PY140G	1706	171	14	2	318	327
PY200G	1743	17	587	8	10538	11916

The mean, the number of observations (before and after imputation) and the standard errors for the equivalised disposable income breakdown by sex, age groups and household size (mean and standard errors based on weighted data while the number of observations based on unweighted results)

Equivalised disposable income	Mean[4]	Standard error	Mean[5]	Standard error	Number of observations	
					Before imputation	After imputation
Subclasses by household size						
1 household member	13212	212	13075	210	2441	2934
2 household members	16695	236	16655	236	6158	8186
3 household members	15774	220	15756	220	6531	10218
4 and more	12217	174	12215	174	15623	27643
Population by age group						
<25	12237	128	12223	128	10239	16945
25 to 34	15264	241	15231	240	3771	6386
35 to 44	13981	234	13955	232	3798	6284
45 to 54	14510	228	14485	227	4776	7986
55 to 64	15049	202	15016	202	3442	5013
65+	13840	116	13821	116	4727	6367
Population by sex						
Male	13816	110	13790	110	14663	23673
Female	13752	122	13734	121	16090	25308

[4] Taking into account only households/persons receiving such income.
[5] Taking into account whole population (households/persons) surveyed.

2.3. Non-sampling errors

Sampling frame and coverage errors

The sample for EU-SILC 2005 was selected from the sampling frame based on the TERYT system, i.e. the *Domestic Territorial Division Register*. Two kinds of primary sampling units (PSU) were distinguished in the sampling frame:

- about 178 000 *CEA – census enumeration areas* with about 68 dwellings each,
- about 33 000 *ESD – enumeration statistical districts*, with about 377 dwellings each.

The whole territory of Poland is divided into enumeration statistical districts and census enumeration areas. In EU-SILC census enumeration areas are used as primary sampling units. The secondary sampling units are dwellings. For each census enumeration area a list of dwellings was made up to form the secondary sampling frame. All the households from the selected dwellings are supposed to enter the survey.
The TERYT system is updated annually with respect to the territorial division into statistical districts and census enumeration areas. The lists of dwellings, names of towns, villages and streets are updated. Other changes due to new construction, dismantle of buildings and administrative division modifications are also introduced.
The sample for EU-SILC 2005 was selected in September 2004 from the sampling frame updated as of January 1, 2004. In the selected sample some 6.8% of dwellings were found to be non-existing (cancelled, changed for non-residential units) as well as uninhabited or temporarily inhabited.

Measurement and processing errors

As with any other statistical survey, EU-SILC can be burdened with non-sampling errors which occur at various stages of the survey and which cannot be totally eliminated.
According to the interviewers, who after the household and individual interview completion were obliged to answer a few questions concerning interview performance, over 70% of the respondents showed a favourable attitude towards the survey, while about 5% were unwilling towards it. In the interviewers' opinion, in about 86% of questionnaires (both household and individual ones) the quality of non-income data collected could be recognised as good or very good and in 1% - as doubtful. The quality of income data was evaluated as slightly worse, mainly because of item non-response.

In Poland EU-SILC was carried out in May/June 2005.
EU-SILC is a non-obligatory, representative survey of individual households, performed by a face-to-face interview technique with the use of paper form questionnaires (the so called PAPI method). Two types of questionnaire: individual and household questionnaire were applicable. The main survey was preceded by the pilot survey carried out in 2004 and the questionnaire testing (November/December 2003).
The organisation and performance of the survey in the field was within the responsibility of regional statistical offices. Many interviewers were regular employees of the statistical offices having experience in other social surveys. Survey performance in the field was preceded by a series of trainings. Regional survey coordinators were instructed by CSO Social Statistics Division staff members and then the regional survey coordinators trained interviewers at the regional statistical offices.
Interviewers' visits to households were preceded by the introductory letter of the CSO President.

The interviewers received written instructions concerning the survey performance.
Small gifts were given to the families participating in the survey. Each statistical office chose the type of gift for its respondents.

Data recording and check-up took place in regional statistical offices and was done with the use of Microsoft Visual FoxPro. After all the questionnaires for a given household had been recorded (the identifiers being voivodship number, dwelling number and household number), it was possible to make the household screening which consisted of logical and calculation check-up at the section, inter-section and inter-questionnaire levels. The regional files were then transferred to the CSO Computing Centre and combined together to make up the general files at the national level. The national file completeness was also checked with the use of Microsoft Visual FoxPro. Additional check-up was made with SAS checking programmes.
On the basis of overall data files it was possible to create files for Eurostat. Some of the primary target variables could be found directly in the questionnaires, others had to be calculated with the algorithms especially prepared for this purpose.
Tables of EU-SILC results were compiled with the use of: SAS, SPSS, Microsoft Visual FoxPro.

Non-response errors

Achieved sample size

Sample size	**Rotational group**				
	1	2	3	4	**Total**
A	4116	4026	4053	4068	16263
B	9607	9357	9397	9310	37671

A -. number of households for which an interview is accepted for the database

B - number of persons at the age of 16 years or more who are members of the households for which the interview is accepted for the database, and who completed an individual interview.

Unit non-response

- Household non-response rates NRh = [1 – (Ra*Rh)]*100,

Ra = 0.992
Rh = 0.706

Ra – the address contact rate
Rh – the proportion of complete household interviews accepted for the database

NRh = 29.96

- Individual non-response rates NRp = (1 – Rp)*100,

Rp = 0.950
NRp = 5.03

Rp – the proportion of complete personal interviews within the households accepted for the database

- Overall individual non-response rates *NRp = [1 – (Ra*Rh*Rp)]*100,

*NRp = 33.47

Distribution of households

- DB120 - Contact at address

DB120	Rotational group				
	1	2	3	4	**Total**
Address contacted (11)	5567	5530	5561	5580	22238
Address cannot be located (21)	42	48	40	31	161
Address impossible to access (22)	1	2	1	6	10
Address does not exist or is non-residential or is unoccupied or not the principal residence (23)	401	432	409	394	1635
Total	6011	6011	6011	6011	24044

- DB130 - Household questionnaire result

DB130	Rotational group				
	1	2	3	4	**Total**
Household questionnaire completed (11)	4147	4060	4088	4100	16395
Refusal to co-operate (21)	1138	1150	1135	1177	4600
Entire household temporarily away for duration of fieldwork (22)	298	341	321	279	1239
Household unable to respond (illness, incapacity,…) (23)	125	166	145	174	610
Other reasons (24)	37	55	49	57	198
Total	5745	5772	5738	5787	23042

- DB135 - Household interview acceptance

DB135	Rotational group				
	1	2	3	4	**Total**
Interview accepted for database (1)	4116	4026	4053	4068	16263
Interview rejected (2)	31	34	35	32	132
Total	4147	4060	4088	4100	16395

Item non-response (income variables)

Item non-response	(A)	(B)	(C)
	% of households having received an amount	% of households with missing values	% of households with partial information
Total household gross income	40.3	6.5	52.8
Total disposable household income	67.7	5.8	26.2
Total disposable household income before social transfers other than old-age and survivor's benefits	67.4	8.5	22.1
Total disposable household income before social transfers including old-age and survivor's benefits	60.6	11.3	16.4
Net income components at household level			
HY040N	1.2	0.1	0.0
HY050N	23.4	0.3	0.5
HY060N	4.4	0.1	0.0
HY070N	6.0	0.2	0.0
HY080N	5.1	0.6	0.0
HY090N	1.1	0.7	0.0
HY110N	2.3	0.1	0.0
HY120N	42.8	4.7	0.0
HY130N	5.0	0.3	0.0
HY140N	40.5	33.4	22.8
HY145N	44.3	3.5	0.0
Gross income components at household level			
HY040G	1.2	0.1	0.0
HY050G	22.9	0.3	1.0
HY090G	0.6	0.7	0.5
HY110G	2.0	0.1	0.3
HY140G	40.5	33.3	23.4
	% of persons 16+ having received an amount	% of persons 16+ with missing values	% of persons 16+ with partial information
Net income components at personal level			
PY010N	29.3	6.8	0.1
PY020N	0.1	0.4	0.0
PY035N	3.0	0.6	0.0
PY050N	4.6	3.1	0.2
PY080N	0.0	0.0	0.0
PY090N	3.6	0.3	0.0
PY100N	22.4	1.4	0.4
PY110N	1.4	0.1	0.0
PY120N	0.4	0.1	0.0
PY130N	6.3	0.3	0.0
PY140N	0.8	0.0	0.0

	% of persons 16+ having received an amount	% of persons 16+ with missing values	% of persons 16+ with partial information
Gross income components at personal level			
PY010G	16.1	6.8	13.3
PY050G	4.7	1.4	3.3
PY080G	0.0	0.0	0.0
PY090G	2.1	0.3	1.5
PY100G	15.5	1.4	7.3
PY110G	0.9	0.1	0.5
PY120G	0.1	0.1	0.3
PY130G	4.3	0.3	2.1
PY200G	28.0	3.7	0.0

2.4. Mode of data collection

EU-SILC is a non-obligatory, representative survey of individual households, performed by a face-to-face interview technique with the use of paper form questionnaires (the so called PAPI method). Two types of questionnaire: individual and household questionnaire were applicable.

Distribution of RB250 and RB260

- RB250 – Data status

DB250	Rotational group				
	1	2	3	4	**Total**
Information completed only from interview (11)	9607	9357	9397	9310	37671
Individual unable to respond (illness, incapacity, etc) (21)	38	37	36	46	157
Refusal to co-operate (23)	238	218	213	256	925
Person temporarily away and no proxy possible (31)	209	165	235	181	790
No contact for another reason (32)	32	33	26	32	123
Total	10124	9810	9907	9825	39666

- RB260 – Type of interview

RB260	Rotational group				
	1	2	3	4	**Total**
Face to face (1)	7750	7519	7619	7503	30391
Proxy interview (2)	1857	1838	1778	1807	7280
Total	9607	9357	9397	9310	37671

As for individual interviews, in 2005 a relatively high share (19%) of proxy interviews was noted. This was thoroughly discussed with the survey coordinators in the field.

The interviewers decided on proxy interviews only if the substitute respondents were well informed about the situation in the household and there was no other possibility to get the information. Proxy interviews were performed in the following situations:
- no contact with the respondent because of long-term absence (e.g. work in another town or abroad);
- respondent's disability, illness or pathology (such as alcoholism);
- according to other members of the household, the respondent was only available late at night and was not willing to participate in such a long interview, while at the same time the proxy could provide detailed information, even based on the documents, such as tax statements.

2.5. Imputation procedures

Imputation is aimed at obtaining complete records at the level of target variables. Thus the target variable level is the highest level of aggregation at which imputation can be made. This approach is applied wherever it does not cause loss of significant information from the file.
In the situation where:
- a target variable includes components of different character (e.g. taking different but highly predictable values, like benefits, or dependent on explanatory variables and thus easier to be modelled separately),
- there are many components of a target variable and it is often the case that in some of them there are missing data, while in others there are correct ones which could be lost during the imputation of the aggregated variable,

imputation is carried out at the level of particular components of target variables, frequently at the level of questionnaire variables. In some cases the target variables are identical with the questionnaire variables.

There are several methods of component imputation. They can be classified as deterministic and stochastic methods. In case of deterministic methods the method and the set of explanatory variables (algorithm) determines the imputation value for each record. In stochastic methods the imputation value is determined randomly so that with the same algorithm and the same data file each algorithm realisation may give slightly different imputation values. Although the stochastic methods slightly increase estimator variance (introducing an additional random error component), they do not distort variance or original data distribution characteristics, allowing for the correct estimation of random error. Deterministic imputation causes variable variance reduction in the file and underestimation of random error; it also distorts the correlation structure (increasing correlations with explanatory variables). According to item 2.7 of Decision 1981/2003 it is recommended that for EU-SILC imputation the methods retaining distribution characteristics should be used, which means the preference for the stochastic methods.

Out of the stochastic methods the following were used in the task presented here:
- Hot-deck method

Random selection of a representative (donor) out of the correct records.
If auxiliary categorising variables occur in the hot-deck method, a random representative is selected out of the records showing adequate values of auxiliary variables. If it proved impossible to find a donor of the equivalent values for all the auxiliary variables, the so called sequence approach was applied. The categorising variables were ranked from the most to the least significant ones. If there are no donors in the group, grouping is carried out with the subsequent explanatory variables left out, starting from the least significant ones so as to obtain a subset containing donors.

- Regression imputation with simulated residuals

Auxiliary variables are the explanatory variables of the regression model. The model takes a logarithmic form because of the income variable distribution. It is fitted on the basis of the correct records. The imputed value (its logarithm) is a sum of the theoretical value derived from the model and the pseudo-random number of the normal distribution with variance corresponding to the estimated variance of an error term in the model.

Out of the deterministic methods the following are applied:

- Regression deterministic imputation

A theoretical value from the model is taken as the imputation value.

- Deduction imputation

The imputation value is directly determined on the basis of the relationships between variables.

In the case of imputation at the target variable level or imputation of their most significant components, stochastic imputation is applied in order to retain the variable properties distribution as required by Decision 1981/2003.

The employment of regression imputation with simulated residuals requires a model which describes well the formation of a variable with relatively small variance of an error term and good statistical qualities. With high variance of an error term, there is a danger of getting accidental values which are not typical of the correct part of the data set. That is why in the majority of cases, where in accordance with the assumption referred to above stochastic imputation is required, the hot-deck method is applied. This is particularly justified when the number of records for imputation is rather low, or when the number of correct records is too small for a suitable model fitting. Regression imputation with randomly generated residuals is applied to incomes from hired employment, as:

- it is an important category of income, declared by a significant percentage of respondents and, if present, having a significant share in the total household's income,
- this category can be successfully modelled with the use of the variables included in the questionnaire,
- there is a large (absolute) number of missing data, the percentage, however, being rather small; a large number of correct records makes it possible to design a well-fitted model.

Deterministic imputation is applied where missing data concern less significant components of target variables (taxes, burdens to the main component, additions, etc.) and the main component is known. In such cases deterministic regression imputation is usually applied. Gross/net conversion is carried out with the use of the deterministic regression method. Deduction imputation is employed in rare cases of obvious relationships and can be treated as a supplementary stage of data editing.

The explanatory variables in the models and the grouping ones in the case of hot-deck method have been selected so as to represent the relationships which, according to logics and knowledge about the phenomena studied, should occur in the data set, taking into account availability of the potential variables in the questionnaire. The relationships have been tested on the file of correct data and in the majority of cases they proved to be significant. Some of the explanatory variables, when expressing an economically important relationship or providing a grouping condition (interpretation criterion) in the calculation algorithm, have been retained, even if their effect on the imputed variable has not been statistically significant.

Imputation of the missing individual questionnaires

The imputation of the missing individual questionnaires is made with the use of hot-deck method.
The data on the donor's total income: gross, net and taxes as well as those on the sums of individual income components used for the calculation of the obligatory target variables at the household level are transferred to the taker's record.

2.6. Imputed rent

For 2005 imputed rents haven't been calculated.

2.7. Company cars

The information on the private use of the company car is collected in the individual questionnaire. Here belongs the respondent's estimated amount he/she has gained by using the company car for private purposes. In case of the missing value (the respondent was using the company car but did not estimated the amount gained) imputation is applied with the use of hot-deck and regression imputation with simulated residuals methods.

3. COMPARABILITY

3.1. Basic concepts and definitions

The reference population

There were no essential differences between the national concepts and standard EU-SILC concepts.

The survey unit was a household and all the household members who had completed 16 years of age by December 31, 2004.
The survey did not cover collective accommodation households (such as boarding house, workers' hostel, pensioners' house or monastery), except for the households of the staff members of these institutions living in these buildings in order to do their job (e.g. hotel manager, tender etc.).
The households of foreign citizens could participate in the survey.

The private household definition

There were no essential differences between the national concepts and standard EU-SILC concepts.

Household is a group of persons related to each other by kinship or not, living together and sharing their income and expenditure (multi-person household) or a single person, not sharing his/her income or expenditure with any other person, whether living alone or with other persons (one-person household).
Family members living together but not sharing their income and expenditure with other family members make up separate households.
The household size is determined by the number of persons comprised by the household.

The household membership

There were no essential differences between the national concepts and standard EU-SILC concepts.

The household composition accounted for:
- persons living together and sharing their income and expenditure who have been in the household for at least 6 months (either the real or the intended time of staying in the household should be considered),
- persons absent from the household because of their occupation, if their earnings are allocated to the household's expenditure,
- persons at the age of up to 15 years (inclusive), absent from the household for education purposes, living in boarding houses or private dwellings,
- persons absent from the household at the time of the survey, staying at education centres, welfare houses or hospitals, if their real or intended stay outside the household is less than 6 months.

The household composition did not account for:
- persons at the age of over 15 years, absent from the household for education purposes, living in boarding houses, students' hostels or private dwellings,
- men in military service (those performing substitute military service working in companies and living at home are included in the household),
- persons in prison,
- persons absent from the household at the time of the survey, staying at education centres, welfare houses or hospitals, if their real or intended stay outside the household is more than 6 months,
- persons (household's guests) staying in the household at the time of the survey who have been or intended to be there for less than 6 months,
- persons renting a room, including students (unless they are treated as household members),
- persons renting a room or bed for the time of work in a given place (including such works as land melioration, geodetic measurements, forest cut-down or building constructions),
- persons living in the household and employed as au pairs, helping personnel on the farm, craft apprentices or trainees.

The income reference period(s) used

There were no differences between the national concepts and standard EU-SILC concepts.
The income reference period was last calendar year (2004).

Reference period for taxes on income and social insurance contributions

The reference period for income tax prepayment and compulsory social insurance contributions is the year 2004. The account clearance with the Treasury Office (including payments and returns) effected in 2004 refers to the income for 2003.

The reference period for taxes on wealth

There were no differences between the national concepts and standard EU-SILC concepts.

Taxes on wealth paid during the income reference period (2004) were recorded.

The lag between the income reference period and current variables

The lag between the income reference period and current variables is about 5 months.

The total duration of the data collection of the sample

EU-SILC was performed on the territory of the whole country between May 2 and June 17 2005.

Basic information on activity status during the income reference period

Considering the fact that the questionnaire form for 2005 had been prepared before the methodological changes of variables were notified to us by Eurostat, the variables: Change of job since last year (PL160), Reason for change (PL170), Most recent change in the individual's activity status (PL180) - were not recorded. Starting from EU-SILC 2006, they have been taken into account. All the remaining variables were in accordance with Eurostat's requirements.

3.2. Components of income

Imputed rent

Variable was not recorded.

Interest paid on mortgages

Variable was not recorded.

Cash or near-cash employee income

This variable does not account for:
- assistance for foster families; since granting the benefit is not connected with quitting the job, this benefit has been qualified to the category of „Family related allowances' (HY050),
- benefit granted to the families when the only person providing income for the family is called up to the active military service; since this benefit is only granted when the only family supporter has been called to the military service, it has been included in the category of „Family related allowances' (HY050).

Non-cash employee income

The information collected only refers to the income gained from the use of the company car for private purposes.

Employers' social insurance contributions

Variable was not recorded.

Cash profits or losses from self-employment (including royalties)

The data on income from self-employment were collected in two different ways: the respondents were asked about the company's costs and profits and also about the amount of money gained from self-employment which was allocated to the household's expenditure. After a detailed analysis of data it was decided that the income from self-employment would be equal to the amount allocated to the household's needs.

Value of goods produced for own consumption

Variable was not recorded.

Survivors' benefits

Death grants are not included in the income because the whole sum is used to cover the cost of the funeral.

Sickness benefits

Sickness and childcare benefits are not included (a childcare benefit is granted to the working parent of a sick child), because they are paid by the employer and cannot be detached from the income from hired employment. Therefore, they are accounted for in the income from hired employment.

All the other variables not listed above

There were no divergences from common definitions.

The source or procedure used for the collection of income variables

The income data were collected during the interviews with respondents. The target income variables were split into components corresponding to particular benefits applicable in the Polish conditions.

The form in which income variables at component level have been obtained

The respondents were asked to give the net incomes and contributions (income tax prepayments and compulsory social insurance). Only in the case of income from rental of a property (HY040) the respondents were asked to give the gross income and the amount of tax paid.

The method used for obtaining income target variables in the required form

The gross income was obtained by summing up net value, income tax prepayments and compulsory social insurance contributions. If the information on tax and insurance contributions was missing, the amounts were imputed on the basis of the results obtained. Only in the case of income from rental of property, the tax paid was subtracted from the gross income.

3.3. Tracing rules

Not applicable since EU-SILC 2005 is the first wave of EU-SILC with the rotational design.

4. COHERENCE

4.1. Comparison of EU-SILC and HBS results

The objective of this section is to compare HBS (Household Budget Survey) and EU-SILC results.
Up to 2004 the HBS provided the main source of data on the living conditions of the Polish population, among others on incomes, dwelling conditions and households' equipment.
The HBS has been regularly conducted every year since 1993 up to now with the use of the rotational method. The households are surveyed in the two year panel.
In the HBS the main source of data is the so called diary. Two additional questionnaires are also filled in.

When comparing these two sources we must take into account the discrepancies. The differences are to great extent brought about by the methodological diversity. Here are the main diverging points:

- Different reference periods for income variables – in HBS the reference period is 1 month and, following Eurostat's recommendation, the annual income is the monthly income multiplied by 12, which in the case of irregular income, like that from farming, can bring about considerable distortions. In EU-SILC the reference period is a calendar year preceding the survey;
- Different types of income are taken into account i.e. in HBS the information is collected both about the income in cash and in kind, while in EU-SILC – only about the income in cash (with a few exceptions), which may be important for the income from farming and social benefits other than retirement pay and pension. Moreover, EU-SILC does not take into account the so called lump sums which is the case in HBS;
- Different way of data collection – in HBS the respondents make records in the so called diary. They have to determine the data sources themselves and do not have them listed in the diary. This may cause omissions. In EU-SILC each respondent is asked detailed questions. In EU-SILC all the income missing data are imputed, while there is no imputation in HBS;
- Different way of sample selection – in HBS households which refused to participate in the survey are replaced with those from the so called reserve list. No replacement is applied in EU-SILC;
- Slightly different weighting of results.

In some tables below socio-economic groups' breakdown is used. The household survey results are traditionally prepared by CSO according to the so called socio-economic groups of households. The main criterion for socio-economic group classification is the prevailing source of income.
In tables below only weighted data are presented.

Tab. 1. Structure of population by age

Specification	EU-SILC 2005	HBS 2005
	in %	
Total	100.0	100.0
0-14	16.7	18.4
15-24	15.9	16.8
25-54	44.1	41.8
55-64	10.2	10.9
65+	13.2	12.1

Tab. 2. Structure of population by level of education

Specification	EU-SILC 2005	HBS 2005
	in %	
Total	100.0	100.0
No school education	2.9	1.1
Completed primary	19.9	21.3
Lower secondary	4.9	6.2
Elementary vocational	26.8	27.0
Secondary	32.6	33.0
Higher	12.8	11.3

Tab. 3. Structure of households and persons in households by socio-economic group

Households	Households		Persons in households	
	EU-SILC 2005	HBS 2004	EU-SILC 2005	HBS 2004
Total	13300839	13336976	37742059	37757641
Total = 100				
Employees	46.4	42.9	55.1	51.4
Farmers	2.8	4.4	4.0	6.5
Self-employed	4.5	5.9	5.1	7.1
Retirees	27.9	26.5	20.1	18.5
Pensioners	11.3	13.2	8.8	10.0
Maintained from non-earned sources	6.9	7.2	6.8	6.5
Not defined	0.2	-	0.2	-

Tab. 4. Average yearly equivalent income in PLN by socio-economic group

Households	Disposable income		Income from hired work	
	EU-SILC 2005	HBS 2004	EU-SILC 2005	HBS 2004
Total	13761	12978	7468	6365
Employees	15648	13867	12749	11214
Farmers	8738	10970	554	862
Self-employed	18348	17546	2524	2481
Retirees	12697	13118	886	1229
Pensioners	9215	9482	663	1015
Maintained from non-earned sources	6908	7948	701	580

Tab. 5. Average yearly equivalent income in PLN by number of persons

Households	Disposable income		Income from hired work	
	EU-SILC 2005	HBS 2004	EU-SILC 2005	HBS 2004
Total	13761	12978	7468	6365
1-person	13075	13107	3925	3393
2-persons	16655	15427	6569	5418
3-persons	15756	14792	10060	8571
4-persons	13895	12933	9199	8009
5-persons	11187	10952	6358	5754
6-persons and more	10248	9430	4842	3632

Tab. 6. Households provided with selected durables

Specification	EU-SILC 2005	HBS 2005
	in %	
Fixed telephone	76	74
Mobile telephone	63	65
Television set	96	98
Computer	38	39
Printer	28	26
Internet connection	23	23
Microwave oven	31	33
Dishwasher	7	5
Refrigerator	96	98
Automatic washing machine	79	80
Passenger car	49	47

4.2. Comparison of income data from SNA for the household sector and EU-SILC

The comparison concerns the disposable income and its main components: income from hired work, self-employment (in and outside farming) and social benefits. It was found out that disposable income in EU-SILC was 54% of the respective income category in SNA. This is brought about by the following factors:

- The household population in SNA covers collective households which are not included in EU-SILC.
- The two systems implement different methods of measuring income from self-employment.
- The primary and secondary distribution of incomes accounts in SNA, used for the disposable income calculation cover some items which are not taken into account by EU-SILC, the most important of which is "imputed rents".

In SNA the income from self-employment is calculated as the so called operating surplus which is the balance between the gross output and the current production input i.e. intermediate consumption and hired employees' wages. This difference is reduced by tax and increased by subsidies. The operation surplus calculated in this way is allocated to household's consumption, dwelling-related investment and business-related investment.
In the Polish EU-SILC the question about income from self-employment refers to the amounts allocated to household's consumption and dwelling-related investment. Besides, SNA takes into account consumption from own production, not covered by EU-SILC in the case of farming. Because of these differences the incomes from self-employment in EU-SILC amount to 24% of the operating surplus in SNA only (with the deduction of section K).
The income from hired work in EU-SILC is equivalent to 90% of the corresponding SNA category, while social benefits – to 89%, respectively, which seems to be a satisfactory result.

Comparison of 2004 results of SNA and EU-SILC for Poland

Category in SNA	Variables in EU-SILC 2005	Category description in EU-SILC 2005	SNA in mln PLN	EU-SILC in mln PLN	SNA = = 100%
Gross disposable income (net)	HY020	Total disposable household income (net)	627 766	340 299	54
Wages, salaries and other income connected with hired work (gross)	PY010G	Employee cash or near cash income (gross)	288 540	258 818	90
Gross operating surplus (gross) with the exception of section K	PY050G	Self-employment income (gross) - value allocated to household's consumption and dwelling-related investment	182 152	44 141	24
Social security benefits and social assistance benefits (gross)	PY90G + PY100G + PY110G + PY120G + PY130G + PY140G + HY050G + HY060G + HY070G	Social benefits (gross)	148 289	132 093	89

Remarks:

1. Remarks in brackets: “net” or “gross” refer to including or not including income tax and social security contributions while the word “gross” in SNA names of categories refer to including of depreciation of fixed assets.

2. Data for gross operating surplus in SNA has been taken into consideration with the exception of section K what allows for better comparability with EU-SILC data on self-employment income (PY050G). The data for section K includes mainly imputed rents, not calculated in EU-SILC 2005 (data for 2004), and market income from renting of real estate included in EU-SILC as the variable HY040G.