

INTEGRATED HOUSEHOLD SURVEY, BULGARIA INSTRUCTIONS FOR THE INTERVIEWER

At the very beginning the interviewers are to explain that the information supplied by the household members will not be made public in any way. Make clear that household members will not be identified by name in any of the reports that are planned to be written on the basis of this survey.

Start the interview only after you have obtained the express agreement to do so by the member of the selected household.

-List the exact dates/year, month, time/ of visits at a given address even in those cases where it was not possible to find any member of the household registered at that address. You may visit one and the same address no more than 3 times.

-In case of refusal or when the household is not found you can use a replacement household with the reason for replacement being listed/Question 6 of the title-page/. Replacements of households which are not found have to be made only after such households have been visited 3 times.

-Particular attention should be paid to “time began” and “time ended” boxes where appropriate times of the interview have to be listed.

I. CODING AND FILLING IN THE ANSWERS

1. All codes in the questionnaire have to be filled in.
2. Usually codes are to be found in the space underneath the question to which they refer. In case that the code box is excessively long and refers to more than one question then there are special code tables either on the same page with the question to which they refer, or on the next few pages. Only in the case with codes of the professions the same code table has been provided on the last page of the questionnaire, too.

3. Make sure you know what answer has to be listed for each particular question, and also the way in which it has to be listed.

-With regard to questions from the title-page relating to the main respondent as well as with the majority of questions under Section 4 on Housing the answers first have to be circled and then listed in the place indicated next to the question itself.

-Most questions require usage of numeric codes which, as already mentioned, **can be found in the space underneath the questions or in the so called code tables near by the questions to which they refer.**

-It is obligatory to observe the requirement that, if necessary, **the to a particular question should be**

listed in full detail.

-Take care that you know the type of measurement and time units relating to properly listing the answer to a question. For example, in BGL, in kilometers, in years, in months, in years+months, in days, in hours, in square meters, etc.

-As most sections in the questionnaire contain more than one page when listing data about household members it is necessary to observe the following procedure: **list answers provided by a given household member to all questions of the respective section and only after completing this you can proceed to the next household member.**

II. FILTER QUESTIONS (SCREENS)

Be very careful with filter questions. Make sure you know which exactly is the next question you have to ask because each new question comes as a result of the answers provided so far.

-In cases where **according to the conditions of the filter questions it is necessary to skip asking a certain question the respective box has to be left blank/no coding/.**

With a number of questions codes there is an arrow symbol () followed by a number. This means that after filling in the question answer the interviewer should skip to the question with the number that the arrow points to.

-In cases where a question is asked but the answer of the respondent is “No quantity purchased/No quantity received from other sources”, etc. (for example, Section 5.1 on Food Expenditure and Consumption, Section 5.2 on Purchase of Non-Food Commodities, etc.) or the answer “No such expenditure” (for example, Section 5.1, Section 5.2, Section 6.9, etc.) Or the answer is “Do not use...” (for example, Section 6.5 on Agricultural Land) or the answer is “Do not own...” (Section 6.8 on Agricultural Labor Allocation: Livestock, Section 9.1 on Household Furniture and Durables, etc.) **the code used should be “0”.**

-In cases where the respondent **refuses to provide an answer then the code used should be “OTC”.**
Where respondents do not know the answer use code “NES”.

III. Read all questions as they are written in order to avoid danger of being misunderstood by the respondent.

INSTRUCTIONS ON SOME SPECIFIC POINTS IN DIFFERENT SECTIONS

SECTION 1: HOUSEHOLD ROSTER

-Question 1: **MAKE INITIAL LIST OF ALL PERSONS IN THE HOUSEHOLD.**

This is the so called “extended household” which includes:

1. Renters.
2. Guests
3. Household members that have been absent for a considerable length of time (more than 3 months during the last year). List reason for absence, for example work in another part of the country or work outside Bulgaria. To keep the confidential nature of the survey list only first names.

-To all individuals listed ask Questions 2-10 in order to find out whether they are household members and also to be able to define the household in terms of “household proper”.

-With regard to Question 11 you have to determine whether the initial listed individuals are **HOUSEHOLD MEMBERS**, i.e. whether they meet the following requirements:

1. HAVE A COMMON DWELLING AND LIVE PERMANENTLY THERE
2. HAVE A COMMON HOUSEHOLD BUDGET
3. HAVE NOT BEEN ABSENT FROM THIS DWELLING FOR MORE THAN 3 MONTHS DURING THE LAST YEAR.

-In cases where a given dwelling is occupied by two or more families who share budgets at least with regard to expenditures for food and current costs to cover electricity, water supply and heating, such families have to be defined as one household.

-Renters, guests as well as household members who do not meet the above requirements are not to be listed under Question 11 and in the Annex.

-After you have determined precisely the household members under Question 11 remember to list their names, numeric codes and age in the Annex. Household Roster on the last page. List household head first.

-In cases of households with students who study in another part of the country and have been absent for more than 3 months during the last year, such students have to be included in the initial list of persons occupying this dwelling, but later when coming to Question 11 they will be excluded from the list and also from the ANNEX - HOUSEHOLD ROSTER. However, as such students are in fact supported by their households, they have to be listed in Section 7.2 on Absent Household Members and Other Persons Who Receive Contributions from the Household.

With regard to the household roster flap in the Annex codes of individuals have to be listed as codes of household members which are to be found immediately before Question 1 of Section (p. 5) with numbers from 01 to 15.

SECTION 2: MIGRATION

Migration has to be understood as movements of household members from one center of population to another, not in terms of changing dwellings within one and the same center of population.

Pay particular attention to the way you have to fill in answers to Question 1 and Question 4 of this section. List the name of the center of population and its code from the relevant code table. FOR EXAMPLE, the name of the center of population is SOZOPOL.

List NAME and CODE OF SOZOPOL, which in this case is 304/small town within Bourgas region.

SECTION 3: EDUCATION

This section refers to all household members aged 6 months and up.

-Determine precisely the exact educational level of each household member who qualifies for the purposes of this particular Section/Question 3/. Use the respective detailed code table.

-With regard to Question 6 in case that a given respondent besides school has also attended a university then you have to arrive at the total number of years spent in school and university.

Questions 8 through 14 refer to household members who have already finished their education, including university degree, secondary school or all kinds of training courses.

With regard to “Post-graduate qualification” this has to be indicated in terms of training courses within the range of questions 8 through 14. In cases where a given course the answer to question 4 of Section 3 on Education (“Does”...”still go to school/higher education/university?) has to be listed as “No”.

Questions 25 to 27 of this Section refer to cases with more specific educational training like extra-curricular activities or private tuition which are additional to formal school/University education.

-Be careful with filter questions.

SECTION 4: HOUSING

With regard to Question 7 whether the household lives in own dwelling including own yard the estimated value of the dwelling to be listed has to reflect value of both dwelling and yard.

With regard to Question 36 of this Section in cases where payments or fees for certain kinds of heating are done on an annual basis, such lump sums have to be divided by 12 in order to arrive at the figure to be listed.

SECTION 5.1: FOOD EXPENDITURE AND CONSUMPTION

-The purpose of this Section is to determine the pattern of food consumption for each household member. This includes all the food that members of the household have bought and eaten.

-For each different kind of food for which the answer to Question 1 has been “Yes”, proceed to ask Questions 3, 4, and 5.

-For each kind of food there has to be applied THE SAME REFERENCE PERIOD, either in terms of weeks or months to which Question 3 and 5 are asked. For example, if for “Maize flour” under Question 3 the interviewer settles for answers in terms of months, the answers to Question 5 should also refer to the same period.

-With regard to Question 3.a what has to be listed is the total quantity consumed that has been bought during the period.

-With regard to Question 3.c you have to list the quantity consumed that has been received from other sources.

Whatever food the household receives in kind, like for example flour, sugar, vegetable oil, etc. from cooperatives (after it has contributed its land, either in part or in whole, for use in a cooperative) has to be listed under Question 3.c (received from other sources). Remember, however, to list here only those products received which are intended for self-consumption. Do not list quantities intended for commercial purposes or products to be supplied to relatives and other persons, etc.

-With regard to Question 3.d list how much was eaten from own production.

-With regard to Question 4, “Current price” shall be understood to mean “market price at the moment.”

In case that with regard to Question 2 (unit price of food consumed) there are no specific requirements, list the respective measurement unit to determine the quantity of consumed food in Question 3 and the quantity purchased (per week or per month) in Question 5.

-It is not necessary to try to achieve a balance between the quantities of food received by the household (whether bought or coming from own production or from other sources) and the food consumed. It may so happen that the food currently consumed by the household has in fact been acquired long before the period under survey or, alternatively, the food has been purchased (produced) within the above period but with a view to be consumed during the coming next few months.

Food products bought by the household as pet food (for dogs, cats, birds, etc.) Or to be used by livestock or fowl are not included in this Section. Pet food bought by households has to be listed under Section 5.2, while livestock food is listed under Section 6.9.

Pay particular attention to quantity of bread consumed by household members. For Question 2 the measurement unit for bread is indicated to be in kg. However, as usually the size of bread loaves sold

is 0.800 kg., not by 1 kg. For example, if the respondent says that his/her household has consumed 12 loaves for the last week you can arrive at the exact figure to be listed by multiplying the number of loaves by their weight, i.e. $12 \times 0.800 = 9.6$ kg.

The same procedure has to be applied when listing quantities of canned foods, fruits, vegetables and meals. Quantities reported should be calculated basing on specification of used by the household jars capacity. Some of the smallest quantities, as for instance the spices, should be reported in format 0.00X kg.

With regard to “Other meals purchased outside and consumed either within or outside home, “list sandwiches and food consumed by household members at lunchrooms, restaurants, snackbars, etc. as well as food bought for home consumption from culinary shops and other such places. For such meal items only the quantity and value should be reported, but not unit price.

SECTION 5.2: PURCHASE OF NON-FOOD COMMODITIES

With regard to certain commodities and services in this Section the boxes for measurement units, quantity and unit price are darkened which means that they have to be left blank.

“Mail service” is to be understood as sending of letters and parcels. In cases where there is a telephone in the dwelling occupied by the household, telephone expenses are listed under Section 4 on Housing, Question 43. Alternatively, if there is no telephone in the dwelling and the household is using the post office for this particular service, then telephone expenses should be listed under “Mail service” within Section 5.2.

SECTION 6.1: STATUS AND HISTORY OF EMPLOYMENT

- In this section ask all household member 16 years and older.
- Remember to list all cases of employment in the household: pensioners currently working/non-working; unemployed currently looking/not looking for additional job.
- With regard to questions about type of job/profession and industry list codes which are to be found in the tables for this Section at the end of the questionnaire.
- Income received by women who work during their maternity leave is listed here as salary.

SECTION 6.2: MAIN JOB-DEPENDENT ACTIVITY

In this section interviews are taken from persons who work for a salary or commission for somebody else. In cases where a given person besides working for somebody else is also running a business of his/her own (self-employment included) ask this person to indicate which kind of work is considered by him/her to be the main job, and which is the second one.

Question 9 of this section also includes Income Tax, while answer to Question 11 will have to reflect deductions like self-taxation, municipality taxes and the like. In cases where a member of the household has to repay a loan by means of salary deductions, such monthly deductions have to be listed under Section 8.10 Other Forms of Revenue/Debts.

SECTION 6.3: JOB-DEPENDENT ACTIVITY

(Working for a salary or commission for somebody else)

Question 9 of this section includes Income Tax, while answer to Question 11 will have to reflect deductions like self-taxation, municipality taxes and the like.

In cases where a member of the household has to repay a loan by means of salary deductions, such monthly deductions have to be listed under Section 8.10 on Other Forms of Revenue/Debts.

SECTION 6.4: SELF-EMPLOYMENT - INDEPENDENT ACTIVITY

This section includes household members with a business of their own (entrepreneurs) or working free lance. Do not include here agricultural producers.

In cases where a household member indicates that he/she is involved in some sort of own private business (entrepreneurship) it is necessary to go into more detail and list whether this person has managerial functions or participates in decision making processes, individually or not, concerning business activities, etc. If such a person meets these requirements go to questions on page 31 (INDEPENDENT ACTIVITY: Working for yourself, Entrepreneurship).

In cases where a household member is a shareholder who is not involved in the decision making processes concerning business activities of the company, then REVENUES which this person receives in his/her share holding capacity have to be listed under Section 8.10.

In cases where a household member indicates that on the one hand he/she is self-employed, but on the other hand the same person admits to be also working for somebody else for salary or commission, then it is necessary to list on which of the two forms of employment this person places more importance (in terms of higher income, better image, etc.). Where it is indicated that self-employment

is more important for such a person, then work for somebody else for salary or commission should have to be listed as Second Job-Dependent Activity: Working for a salary or commission for somebody else, while own business is listed under Section 6.4: SELF-EMPLOYMENT. Alternatively, if such a person places more importance on working for somebody else against salary, then it should be listed as MAIN JOB - DEPENDENT ACTIVITY.

SECTION 6.5: AGRICULTURAL LAND

Here you have to describe all land which is used by the household, either own or leased or rented, etc., no matter whether products are used for commercial purposes or for self-consumption.

-Land contributed by the household to cooperatives whose usage is not directly managed and controlled by the household members themselves has to be listed under Section 9.2 on Real Estate Assets. The main principle to be applied here in order to determine whether to list the agricultural land of the household in this section or not has to be whether the household is directly involved in management and planning activities related to usage of such land.

-With regard to Question 6 of this section, “Areas owned by Coop” shall be understood to mean several households joining efforts in a cooperative with household members themselves who work the land and who determine what crops have to be produced, etc.

In cases where a given household is involved in working on agricultural land either as helping hands or as hired personnel, but no household member participates into decision making processes about what kind of crop is to be produced or with regard to allocation of resources for crops, fertilizers, etc., then this land should not be listed under Section 6.5: Agricultural Land. When revenues received by the household as a result of working on such land come under the form of support, such revenues have to be listed in Section 7.1 on Remittances: Income Received from Other Persons.

In cases where such revenues are received as salary, they have to be listed under the Job Sections (Main or Dependent).

Where the responding household is helping with the work on agricultural land and is also involved in decision making processes with regard to relevant agricultural activities to be performed, then this land has to be listed under Section 6.5: Agricultural Land.

SECTION 6.6: CROP PRODUCTION - OUTPUT

-With regard to Question 2 list all crops used by the household, and then add codes for crops from the

code table to the question.

-In case that the same crop is rotated both in summer/i.e. in the open/and also in winter/i.e. in green house/it has to be listed as two separate items.

SECTION 7.1: REMITTANCES-INCOME RECEIVED FROM ABSENT MEMBERS OF THE HOUSEHOLD OR FROM ANY OTHER PERSON

In this section you to list the names of all persons who send money or food to the household, or make any other kind of contribution to this household.

With regard to Question 4(a) it is possible that the person who sends money or food or makes other kind of contribution has more than one type of relationship with the household. (For instance this person may be father and grandfather). In this case select the first applicable code (the first valid relationship) from the code box for Question 4(a). For Question 4(b) and © list name and code of the household member (Question 2) related to the person who is making the contribution to the household (Question 4a).

SECTION 7.2: REMITTANCES-ABSENT HOUSEHOLD MEMBERS AND OTHER PERSONS WHO RECEIVED CONTRIBUTIONS FROM THE HOUSEHOLD

In this section you have to list names of all persons who receive money or food or some other assistance from the household. In cases of the entire family being supported (like in the case of migrant workers) write FAMILY.

For Question 6a fill in the relationship code from the code box. In cases where the person receiving remittance has more than one type of relationship with the household who is providing assistance, then use the first applicable code (the first valid relationship). For Question 6b and 6c fill in the name and the person code from the flap for the person with whom the remittance receiving person (Question 2) has a relationship (Question 6a).

SECTION 8.1: SOCIAL ASSISTANCE/INSURANCE

“Survivor pension” will be understood to mean pension paid to a widow after her husband’s death or pension paid to infants after the death of one or both parents until completion of their education. Pay special attention not to include here the Insurance payments by an insurance policy (as it was in some

of previous versions of the questionnaire) - the former should be reported in Section 8.10: Other Forms of Revenue and Debts.

In Sections 8.2, 8.3, 8.4, 8.5, 8.6, 8.7, 8.8 and 8.9 different social assistance/insurance and other benefit forms indicated in Question 1 of Section 8.1 have been broken down in detail. Remember that child allowances must always be listed on a separate basis and not included into pension amounts (when grandmother is receiving maternity benefits), into unemployment benefits, stipend grants and maternity benefits.

In Section 8.4: Survivor pensions include those pensions which are received after the death of spouse or parent.

SECTION 8.10: OTHER FORMS OF REVENUE/DEBTS

Here revenues from share holding have to be listed as “Income from financial assets”. Pay particular attention to the change put into this section: Revenues received by the responding household member or by any other member of the household during the last month or year have codes from 1 through 4. Debt codes are from 11 through 15.

SECTION 9.2: REAL ESTATE ASSETS

This section does not include real estate assets which have already been mentioned in the following previous sections: Section 4 on Housing; Section 6.5 on Agricultural Land; Section 6.4 on Self-Employment - Business Fixed Assets.