

General Data Dissemination System (GDDS) Project - Phase 2
Socio-Demographic Statistics Project for Anglophone Africa

**Report of the Labor Statistics Module
Workshop on
Designing Labor Surveys and Measuring the Informal Sector**

Pretoria, South Africa
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Organizer:
World Bank

Consultants:
U.S. Bureau of Labor Statistics

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Table of Contents

Acknowledgements	1
Abbreviations	5
1 Background	7
1.1 Workshop participants	7
1.2 Workshop agenda	7
2 Workshop proceedings	9
2.1 Additional Presentations	9
2.1.1 Classification of paid and unpaid labor activities	9
2.1.2 Overview of formal and informal units / Employment and non-market activities	10
2.1.3 Measuring informal employment	11
2.1.4 Overview of select topics to be considered for labor force questionnaires	11
2.2 Issue discussions	13
2.2.1 Overview of LFS for South Africa	13
2.2.2 Overview of informal sector survey – South Africa	13
2.2.3 Overview of formal and informal units / Employment and non-market activities	14
2.2.4 Measuring informal employment	14
2.2.5 Survey design	15
2.2.6 Sample design	15
2.2.7 Questionnaire content and design	15
2.2.8 Tabulation and analysis	15
2.2.9 Data processing	15
3 Country Presentations	17
3.1 Country status reports	17
4 Work sessions and discussions	18
5 Workshop evaluation	26

Annex A	List of Participants
Annex B	Workshop Agenda
Annex C	Labor Statistics Module Reader – Table of Contents
Annex D	Checklist
Annex D.1	Data Quality Assessment Framework – Generic Framework
Annex E	Unit is Time: Paid and Unpaid Labor Activities by Position in Production Unit
Annex F	Overview of Formal and Informal Units / Employment and Non-Market Activities
Annex G	Informal Sector and Informal Employment: Key Concepts and Definitions
Annex G.1	Data Collection Programs: Data Sources for the Informal Sector
Annex G.2	Design and Implementation of Labor Force Surveys
Annex G.3	Informal Sector and Informal Employment Measurement in African Countries
Annex G.4	SNA-93 Framework: Review and Mapping of Key Gender Issues
Annex G.5	Mainstreaming Gender in the Production of Labor Statistics
Annex H	Overview of Select Topics to be considered for Labor Force Survey Questionnaire
Annex I	Template: Country Report: Progress and Plans
Annex I.1	Progress and Plans – Liberia
Annex I.2	Progress and Plans – Malawi
Annex I.3	Progress and Plans – Mozambique
Annex I.4	Progress and Plans – Sudan
Annex I.5	Progress and Plans – Swaziland
Annex I.6	Progress and Plans – Uganda
Annex J	Participant work session tasks
Annex J.1	Country Reports/Feedback – Work sessions on Survey Design and Sample Design
Annex J.2	Country Reports/Feedback – Work session on Questionnaire Design
Annex J.3	Country Reports/Feedback – Work session on Data Collection Strategy
Annex J.4	Country Reports/Feedback – Work sessions on Data Tabulation and Data Analysis
Annex J.5	Country Reports/Feedback – Work session on Dissemination Strategy
Annex K	Template: Participant Evaluation
Annex K.1	Participant Evaluation Results
Annex L	Terms of Reference

The annexes are transmitted separately rather than being incorporated into the Draft Report.

Abbreviations

BLS	U.S. Bureau of Labor Statistics
DQAF	Data Quality Assessment Framework
GDDS	General Data Dissemination Standard
HH	Household
ILO	International Labor Office
IMF	International Monetary Fund
LFS	Labor Force Survey
LMI	Labor Market Information
QLFS	Quarterly Labor Force Survey
SNA	System of National Accounts
STATS SA	Statistics South Africa
TA	Technical assistance
WB	World Bank

1 Background

1.1 Workshop participants

The GDDS labor statistics module workshop on the design of household labor surveys and measuring the informal sector was held in Pretoria, South Africa, May 19-23, 2008. Participants representing six (6) countries attended. The participating countries included: Liberia, Malawi, Mozambique, Swaziland, Sudan, and Uganda. At the request of the GDDS Manager, Statistics South Africa (Stats SA) developed and made presentations each day on the concepts and methods of the new Quarterly Labor Force Survey for South Africa. Additionally, several Stats SA staff actively participated in the work sessions and discussions held each afternoon to share their experiences producing statistics on the informal sector and other labor market issues pertinent to African countries.

In addition to the workshop participants, the following also attended the workshop throughout the week: Mr. Ronald Luttikhuisen, World Bank GDDS Manager and Brian Graf, consultant from the US Bureau of Labor Statistics and labor statistic module manager. A detailed participant list is included in Annex A.

1.2 Workshop agenda

The workshop agenda is attached in Annex B. During the workshop, nine (9) presentations were made by the staff of Stats SA on the topics of:

- Overview of Labor Force Survey for South Africa
- Overview of Informal Sector Survey for South Africa
- Survey Design
- Sample Design
- Questionnaire Content and Design
- Data Collection
- Data Processing
- Tabulation and Analysis of Data
- Dissemination of Data

Copies of the above presentations were included on flash drives distributed at the conclusion of the workshop. The flash drives also included a variety of additional materials related to labor market statistics and the metadata produced by Stats SA. A list of the reader contents is located in Annex C.

Supplemental presentations were made on the following topics:

- Classification of paid and unpaid labor activities (Ronald Luttikhuisen)
- Overview of formal and informal units / Employment and non-market activities (Ronald Luttikhuisen)

- Measuring informal employment (Ronald Luttikhuisen)
- Overview of Select Topics to be Considered for Labor Force Survey Questionnaire (Ronald Luttikhuisen)

In addition to the presentations, work session and discussions were held on the following topics:

- Survey Design
- Sample Design
- Questionnaire Content and Design
- Data Collection
- Data Processing
- Data Tabulation
- Data Analysis
- Data Dissemination

Copies of discussions and comments during each work session are included in Annexes J through J.5.

2 Workshop proceedings

The program was officially opened by Mr. Pali Lahohla, Statistician General, Statistics South Africa (Stats SA). Mr. Lahohla warmly welcomed the participants to South Africa and stressed the importance of labor statistics in Africa. Throughout the continent, there is a growing recognition among all users of statistics that better data on the labor market are needed for sustainable development. He noted that labor should be examined in the context of African societies and the need for improved statistics that would, indeed, consider the specific conditions prevalent in African countries. Mr. Lahohla has personally committed himself to building statistical capacity within Africa and emphasized the importance of collecting and producing data on labor market information to the growth and development of the African continent. In light of recent current events in South Africa, he expressed sadness and dismay that South Africans were attacking citizens of other African nations who had sought refuge in South Africa. He stressed the South African values of tolerance and acceptance and hoped that the participants understood that the events were triggered by the actions of a few and did not represent South Africans. He concluded his remarks by encouraging those present to participate actively in the program and to share their views and experiences so that the discussions on labor statistics would reflect the realities of Africa.

Ronald Luttikhuisen, World Bank GDDS Manager, welcomed the participants to the workshop and discussed the objectives of the program. The main objectives of the workshop were: i) to provide an overview of the concepts and methods necessary to develop a labor force survey using Stats SA's new Quarterly Labor Force Survey as an example in the African context; ii) to discuss and apply the concepts and methods of Stats SA in relation to individual country needs; and iii) to develop the tools necessary to draft a comprehensive proposal for a labor force survey. Mr. Luttikhuisen and the consultant met with individual country representatives on an individual basis throughout the week to discuss the first round of consultant visits and determine needs for the second round of consultant visits to be conducted later in 2008.

Brian Graf, US Bureau of Labor Statistics, Manager of the Labor Statistics Module, distributed and discussed a checklist that would be used by the participants during each work session and discussion. The purpose of the checklist was to assist each participating country in developing responses for the work sessions that focused on each phase of the survey process. In addition to highlighting considerations for each country at each phase of the survey process, the checklist included an overview of survey methods from Statistics Netherlands and demonstrated the connection between each phase of the survey process and the Data Quality Assessment Framework (DQAF). The DQAF focuses on metadata and provides a framework relevant not only to the GDDS program, but also to labor force statistics and labor market information systems. The themes of the DQAF were reviewed.

Copies of the checklist and DQAF outline are included in Annex D and Annex D.1 respectively.

The staff of Stats SA made presentations on the topics listed in 1.2, which included discussions. Pertinent participant comments, questions and responses are included in section 2.2 of this report.

Work sessions and discussions were held following each presentation. During each work session, the participants were asked to apply the concepts and methods discussed during the preceding presentation to their individual needs. Each work session referred to one phase in the eight steps of the survey process (i.e. survey design, sample design, questionnaire content and design, data collection, data processing, data tabulation, data analysis, and data dissemination). The work completed during each work session can be used to develop a comprehensive proposal for a labor force survey. The GDDS Manager for the World Bank, the consultant, and the staff of Stats SA actively participated in each work session providing feedback, guidance, and facilitating discussion.

Individual country responses to each work session are included in Annexes J through J.5.

2.1 Additional Presentations

2.1.1 Classification of paid and unpaid labor activities

During the Launch Workshop held in May 2007 in Kampala, Uganda, Ronald Luttikhuizen presented his work on the classification of paid and unpaid labor activities. Using a spreadsheet classifying and detailing paid and unpaid labor activities, each of the included activities and their classifications was explained and described. The main focus of this discussion was to link the concepts discussed during the workshop with the operational aspects of survey design. That is, how do we translate concepts into surveys producing indicators? The classification of paid and unpaid labor activities provided a detailed view of how labor force activities relate to market and non-market activities.

This classification scheme was used during the workshop held in Pretoria not only to further emphasize how labor force activities related to market and non-market activities, but also to frame the discussion on measuring the informal sector. Mr. Luttikhuizen updated the spreadsheet to include a column indicating the type of sector for each activity (formal, informal, or other). A copy of the spreadsheet is attached in Annex E.

2.1.2 Overview of formal and informal units / Employment and non-market activities

A matrix was developed by Ronald Luttikhuizen highlighting the relationship between employment and non-market activities and the classification of formal and informal units. The spreadsheet indicates whether or not an agreed international standard exists for each unit and activity identified. The working population can be classified as either active or inactive. Those who are active can be employed or unemployed – both groups comprise the labor force. International standards and criteria exist to measure each of these

concepts. The main question is how to apply the criteria used to define whether an individual is employed or unemployed.

Production units can be classified within either the formal or informal sectors depending upon a set of criteria. The main issue related to the classification of units depends upon the criteria used to define whether or not a unit is formal or informal. The first criteria, size, is preferred by the Delhi Group. Using this criterion, all units with fewer than five (5) working persons would be considered informal units. This can be problematic for many countries, especially those countries with extensive small business development, such as the United States. Mr. Luttikhuizen argued that size alone can not be sufficient to classify a unit as formal or informal. Rather, he supports the use of the second criteria, registration status. Registration status will be defined according to national needs. To illustrate his point, he referred to the presentation on the informal sector by the staff of Stats SA where respondents are asked whether or not their employer has registered for the VAT system and whether or not their employer withholds payments to the income tax system on their behalf.

Once the units have been classified, the labor market (i.e. workers, hours, jobs) can be classified according to formal or informal employment. Currently, no standard exists regarding the classification of the labor market into formal and informal labor.

Of critical importance to many countries developing labor force surveys is the measurement of non-market activities. The *System of National Accounts, 1993* (SNA) uses the production boundary to define productive versus non-productive activities. The production boundary guides countries to determine which activities are considered productive and should be included for measurement.

A copy of this matrix is included in Annex F.

2.1.3 Informal Employment

The GDDS Manager extended an invitation to the Statistics Department of the ILO to send a representative to the workshop. It was hoped that Ralph Hussmans, Statistics Department, International Labor Office, would be available to attend the workshop to discuss the measurement of informal employment; however, Mr. Hussmans had other commitments and was not able to attend the program. Ronald Luttikhuizen attended a workshop on household surveys and measurement of the labor force held in Maseru, Lesotho, April 14-18, 2008. Mr. Hussmans was one of the main presenters for this workshop. He provided a copy of his presentation on informal sector and informal employment to Ronald Luttikhuizen, who made this presentation on his behalf. A copy of this presentation can be found in Annex G.

Below is a list of additional presentations from the Lesotho workshop that will serve as valuable reference materials:

- *Data collection programs: Data sources for the informal sector* – Annex G.1
- *Design and implementation of labor force surveys* – Annex G.2

- *Informal sector and informal employment measurement in African countries – Annex G.3*
- *SNA 93 framework: Review and mapping of key gender issues – Annex G.4*
- *Mainstreaming gender in the production of labor statistics – Annex G.5*

One of the topics identified by the participants as important for measurement is subsistence activities. The latest SNA position does not fully integrate subsistence activities into the national accounts. Though no formal definition exists, the SNA production boundary defines total value added and all activities within the production boundary must be valued. The production boundary does not capture non-market activities, as the focus of the SNA is from the perspective of market output.

How does one draw the line between subsistence and informal production? According to the SNA, when a HH engages in any production for pay, profit, or in-kind, the HH should be classified as an informal production unit. Stats SA supports this guideline. Once an individual sells **any** portion of their production, the HH becomes an informal production unit that is no longer engaged in subsistence activities. If only one apple is sold for pay, profit, or in-kind, this guideline would apply. Mr. Luttikhuizen proposed that the distinction between informal activity and subsistence activity is a problem of measurement and should be carefully considered.

Mr. Hussmans, of the ILO, has developed a matrix that reviews all possible combinations between the labor market and informal versus formal sectors. A lively discussion centered on box 7 of this matrix – formal employees working in informal enterprises. The participants attempted to understand how informal enterprises could enter into formal employment arrangements.

Mr. Luttikhuizen reviewed and emphasized the international definitions adopted by the ILO's International Conference of Labor Statisticians. He continued to stress the importance of adhering to international guidelines to promote comparability. At the same time, it is important for statistical agencies to meet the needs of internal users and it is possible to use concepts and definitions that deviate from international guidelines as long as these deviations are clearly defined and explained.

Mr. Luttikhuizen identified the different criteria that are used to define informal employment arrangements and discussed how these can be measured using a labor force survey. The labor force survey is an effective tool to collect data on informal employment.

2.1.4 Overview of Select Topics to be Considered for Labor Force Survey Questionnaire

The GDDS Manager developed an outline of topics to be considered when developing a labor force survey questionnaire. Using the QLFS questionnaire as an example and reference, the basic outline of topics to be considered for inclusion on a labor force questionnaire consist of the following:

- Household box
- Formal versus informal employment
- Formal versus informal production unit
- Non-market activities
- Volunteer work
- Unemployment

When developing a labor force survey questionnaire, the participants should first identify all data needs. The questionnaire should be designed to include content to collect data to meet both internal and external user needs. For example, many of the countries had identified the need for data on migrants, and adding questions related to place/country of origin and how long the respondent has lived in the area would provide these data.

Each topic listed above in the basic outline was discussed using the QLFS questionnaire as a reference and guide. The examples of Stats SA illustrated for the participants how to design questions to collect the data necessary to meet all needs. The QLFS questionnaire was designed bearing in mind the needs of data users in South Africa, and not all topics listed above were included for measurement on the questionnaire. It was noted that the QLFS questionnaire is an excellent example of a labor force survey; however, each country must design a questionnaire based on their data needs.

For those areas that were not included for measurement on the QLFS questionnaire, the GDDS Manager discussed options each country may consider when designing their questionnaire. Specifically, each topic above was discussed in terms of minimum data requirements to more fully describe or measure the specified topic.

A copy of this outline is included in Annex H.

2.2 Issue discussions

Discussions were held during and after each presentation. All pertinent and relevant comments are summarized here below.

2.2.1 Overview of Labor Force Survey for South Africa

The participants were very interested in the details of the monthly work plan written for the QLFS for South Africa. Stats SA developed a calendar that provides a visual management tool indicating when data are collected or when field agents are engaged in listing and updating activities each month.

The participants inquired as to why South Africa re-engineered their labor force program. What had gone wrong? It was explained that users were not satisfied with the unemployment rate. Specifically, users were concerned about the concepts and definitions used in the old LFS and were not happy with the six-month delay required to collect, process and release the data. With the QLFS, a number of changes have been

adopted. First, changes were made to the reference periods used so that the reference period to determine employment status is not the same as the reference period to determine availability for work. Second, all definitions and classifications follow ILO guidelines, whereas in the past this was not the case. Third, the re-engineered LFS invested heavily in resources to ensure that methods were sound and reliable. Fourth, automated tabulation replaced the manual tabulations of the past.

In response to a question regarding data collection activities and the difficulty many countries encounter collecting data, it was noted that Stats SA moved from contracting data collection staff each time data were collected to hiring a permanent staff of enumerators. This has dramatically improved data quality as compared to the old LFS.

Additional measures were implemented to enhance and improve data quality. First, Stats SA implemented bar-coding so that each questionnaire is linked to a specific individual via a barcode and can be tracked. Second, procedures were adopted to ensure that field workers protect confidentiality and safeguard all questionnaires. Enumerators who lose track of questionnaires a number of times will be terminated.

The participants asked for more details on the development of an automated data tabulation plan. Stats SA detailed the process of developing the tabulation plan adopted for use with the new QLFS. Stats SA engaged data users to determine needs. Based on these needs, a detailed tabulation plan was developed and discussed with users.

One participant opined that it does not appear that Stats SA suffers problems with resources or political will, whereas there is limited support for statistics in his own country. The participants also asked why it was necessary to increase the number of staff at the Stats SA Data Processing Center (DPC). By way of response, Yandi Mpetsheni explained that money is a problem for Stats SA, but that the political will exists that facilitates funding requests. Intense interest in labor force data are generated by labor unions and the media. The Government of South Africa responds to this pressure by ensuring resources are adequate at Stats SA to produce data results based on methods and concepts that can be defended and replicated. Further, it is critical to cultivate and maintain the support of management for continued development. The number of staff assigned to the DPC was increased because more and more survey programs within Stats SA are using the DPC for their processing needs.

It was asked whether Stats SA collects data on the working poor; specifically, vulnerable employments and low wages. This question is not asked directly of respondents. It is planned that future modules on the working poor and earnings will be added to the QLFS.

2.2.2 Overview of Informal Sector Survey – South Africa

The participants were particularly interested in how South Africa defined the informal sector. Stats SA uses both size and registration criteria to classify units and to determine whether employment is in the formal or informal sector. With regards to size, those units with five (5) or fewer workers are classified as informal. Questions are also asked

whether the unit is registered for the VAT system or if the unit withholds and makes income tax payments on behalf of the employee. Those units complying with registration requirements are classified as formal.

The participants noted that Stats SA excludes persons whose secondary jobs are informal. Participants also remarked that income from a secondary job oftentimes provides more income than the primary job and wondered how secondary jobs could be excluded in the QLFS.

In response, it was explained that the QLFS determines informal status based on size and registration. If a unit employs less than five (5) working persons, they are classified as informal. Additionally, if the unit is not registered for the VAT or income tax systems, they are classified as informal.

Stats SA has chosen not to pursue secondary employment, as the survey was designed to focus on primary employment. It was explained that in South Africa, the informal sector is dominated by males who engage in trading activities. In response to the comment regarding income from secondary jobs, it was explained that there are two criteria which can be used to determine primary and secondary employment – main hours worked and income. Stats SA relies upon the time criteria. This means that primary employment is defined according to the most time (in terms of hours) engaged in the activity, regardless of income.

Mr. Luttikhuizen commented that the QLFS elicits responses from individuals within households (HH) and asked for clarification regarding the registration questions. Specifically, who it was that registers. A unit must register for the VAT system and individuals must be registered for the income tax system; therefore, the questionnaire identifies the difference between informal sector units and informal labor.

The participants asked the staff of Stats SA to identify the percentage of the active workforce engaged in informal sector activities. Stats SA replied that in 2007, 26.6% were engaged in informal sector activities. This figure includes domestic workers, but, given current methods, domestic workers would be excluded.

During the period 2006-2007, the informal sector in South Africa contracted due to massive development efforts in the townships. This period saw development in areas where before there had been no development. Household based shops were replaced by shopping malls.

Mozambique asked why Stats SA does not include workers who come from other countries, as it is important to know how many individuals are working in South Africa from other countries. In the past (before 1999), the labor force surveys in South Africa were based on the 1-2-3 survey approach developed for Francophone Africa. Filter

questions were asked to determine country of origin. Since 1999, questions are not asked regarding national origin.

The participants asked how Stats SA defines a HH. A HH is comprised of those individuals who spend at least four (4) nights per week in each of the past four (4) weeks. Individuals who do not meet this requirement are considered a separate and distinct HH unit.

Uganda asked how to measure HH based activity when some of the activity is visible, while other HH based activities are hidden. Stats SA replied that most HH activity is not visible and that a HH survey is the key vehicle to measure these activities. It is difficult to list all informal units to develop a sampling frame, as much of the activities are hidden.

Mr. Luttikhuizen emphasized that the area approach is not ideal, and that a HH survey is the best method for measuring informal activities. Stats SA has adopted a good approach, but countries must be aware that they can not adopt directly the methods and definitions employed by South Africa. Countries need to carefully consider the methods and definitions discussed during the workshop and apply these depending upon individual country needs and circumstances.

2.2.3 Overview of formal and informal units / Employment and non-market activities

The participants engaged in a lively discussion on how to define informal sector units. Using the matrix on formal / informal units, employment, and non-market activities, Mr. Luttikhuizen emphasized the challenges encountered when strictly defining an informal unit based on size. The participants agreed that using the criterion of size was problematic and that registration status was a more reliable guide for classifying units as formal versus informal.

In the matrix developed by Mr. Luttikhuizen, the unit equals time. This allows countries to link time use survey with labor force surveys to feed into the national accounts. A time-based approach can also be useful by focusing on the hours worked in each activity and classifying the activities as formal or informal.

2.2.4 Informal employment

Mr. Luttikhuizen emphasized that discussions on the informal sector refer to the classification of units, while informal employment is job based. Many criteria exist for classifying units as formal or informal (i.e. size, registration status), and while the Delhi Group recommends the use of size, the discussion is not yet settled. A clear standard is lacking.

Hussain Chowdhury, Statistics Canada, who has served as the consultant assisting Stats SA to develop the QLFS, opined that not having a strict standard is good, as it allows greater flexibility based on local or national circumstances.

The participants asked whether labor statistics are produced for national accounts or policy-makers. Mr. Luttikhuizen indicated that the production of statistics requires the creation of a harmonized language. Specifically, common classifications systems and common definitions need to be adopted to foster linkages between data series within countries and to promote international comparability. National accountants lead the work in creating a harmonized language, therefore classification systems and definitions are defined from the perspective of the national accounts.

Data based on international definitions should be released to enhance and promote international comparability. Mr. Luttikhuizen stressed that countries can deviate from the standard concepts; however, it is important to clearly define any concepts that deviate from international standards and to fully explain why the definitions deviate. It is acceptable to create individual country criteria, but countries must be fully transparent and explain how and why the definitions deviate from international standards.

A possible explanation was offered of cell #7 in the chart developed by the ILO on the relationship between labor and informal/formal units. Many African immigrants living in the United States work as independent care-givers for the elderly in private households. All of these workers must obtain a social security number in order to obtain employment. This social security number is registered with the US Internal Revenue Service (IRS) for income tax purposes. The workers, themselves, are responsible for paying all taxes. They are registered with the IRS, but because they have no contract are considered informal. This may be what the ILO had in mind when creating cell #7.

2.2.5 Survey Design

The participants asked what efforts had been made to preserve consistency between the former LFS data series and the new QLFS. Stats SA indicated that in the past, with the annual LFS, comparisons were made, but these comparisons were problematic because the sample changed each year and there was no consistency from year to year. The new master sample used by the QLFS facilitates comparisons as the sample is more consistent. When the data are released in August 2008, linking factors will be calculated and applied to create a consistent time series of data.

2.2.6 Sample Design

The participants asked for clarification as to how an enumeration area (EA) is split when it is too large. Primary sampling units (PSU) are split in the head office. Enumerators list all HH within a PSU. During the listing process, the enumerator describes the physical boundaries which define each area. Small EAs ($24 < \text{HH} < 100$) are combined, while large EAs ($\text{HH} > 499$) are split. The smaller EAs are combined for practical purposes, as a larger PSU has a longer life. EAs that are too small require frequent updating. The splitting of PSUs is made conceptually to allow for more flexibility. A physical split would also require more frequent updating.

It was asked why 25% of the sample is replaced each quarter. The rotation process reduces respondent burden and contributes to increased response rates.

The participants commented that the documentation on the sampling methodology needs more detail. As it is written, more detail is needed to clearly understand how the sampling methods of Stats SA were implemented.

In many countries, over-sampling is used to account for non-response and the participants wanted to know which is more efficient – to over-sample or adjust for non-response. Mr. Chowdhury explained that over-sampling increases response bias in a HH survey because only the most willing and available will respond. Maximum effort must be made to reduce non-response in any HH survey.

Regarding sample allocation, a sample at the national level was allocated to the provincial levels using the Neyman allocation method. The Neyman allocation is a sample allocation method used for stratified samples which maximizes survey precision given a fixed sample size. The simplest form of optimal allocation is to make the sampling fraction (f_h) in a stratum (h) proportional to the standard deviation S_h in the stratum, and inversely proportional to the square root of the cost (c_h) of including a unit from that stratum in the sample – that is :

$$f_h \propto \left(\frac{S_h}{\sqrt{C_h}} \right)$$

Thus more heterogeneous and cheaper strata are sampled at higher rates. Often, costs do not differ between strata, so the optimum allocation reduces to $f_h \propto S_h$, the Neyman allocation. Proportional methods were used to allocate the sample to metro areas within provinces.

Numerous questions were asked regarding the challenges of backward estimation or linking of the QLFS with prior data series. The participants noted that changes in methods lead to differences in results and wondered how the data series could be linked for form a meaningful time series of data. Stats SA admitted that it is a challenge dealing with linking factors, especially trying to convince users that the data will be reliable. The QLFS data will be linked only to prior LFS survey data (from 2000 onwards), and not with the earlier labor force data produced prior to 2000.

Additional questions on the QLFS included:

- What is the total number of HH in the QLFS?
 - 30,800 HH (3,080 HH per PSU)
- Are there multiple HH within dwelling units?
 - Yes. It is estimated that there are 32,000 HH and 30,000 dwelling units
- Who is the reporting unit?
 - Any member of the HH who is 15 and above

- Are all cities covered?
 - Yes
- What is the response rate? Do the response rates differ by area?
 - Response rates vary by PSU, but in general the response rate ranges between 80-85% with a non-response rate of 15-20%. The lowest response rate is in Gauteng Province with 76% due to difficulty collecting data from “those behind high walls” (i.e. the wealthy). Like LFS surveys in other countries, there is a problem with selective non-response, such as the difficulty in collecting data from wealthier households. Stats SA has initiated an extensive publicity program to raise awareness and facilitate access.
 - It was noted that tools can be used to determine the characteristics of those who selectively do not respond (i.e. not home, unable to access due to security measures, etc). For example, the enumerator could estimate and note the approximate size of the house, the approximate lot frontage, the number of cars in the driveway, etc. Using these characteristics, specific methods can be used to target these HH to increase response rates.
- At what levels will signification/reliable estimates be produced by QLFS data?
 - National, provincial, and metropolitan areas
- How many dwelling units (DU) are needed for reliable estimates?
 - Estimates will be made for six (6) metro areas. The minimum number of DU needed is approximately 600-700. Proportional methods were used to allocate the sample to the metro areas.
- Did you have any sampling problems related to underestimation or overestimation of the number of DU within each PSU?
 - The sample frame is from 2001, and was somewhat out of date. If it was noted during the listing phase that a particular EA was much larger due to migration, the weights were adjusted, but this affects variation. If it was noted that an EA was smaller, no adjustments were made. At this time there are no plans to update the sample. Population controls were used to account for over or underestimation.
- How are HH selected within EA?
 - A sampling interval was calculated for each EA. For example, if the interval is 10, after a random start every 10th dwelling unit was selected. The sampling interval is based on the census. The target was 10 for each EA, but due to changes in population there were differences. If the interval was less than 13, that interval was used. For sampling intervals greater than 13, the sample was modified to achieve a sampling interval of 13 or less.
- Why is 25% of the sample rotated each quarter? Would it be better to rotate the sample annually?
 - Quarterly rotation reduces response burden and leads to increased response rates.
- During each quarter, are the interviews spread throughout the period?

- The sample is divided into three (3) monthly panels so that data collection is continuous throughout the quarter. Approximately 10,000 dwelling units are contacted each month.

2.2.7 Questionnaire Content and Design

The participants were asked to identify on a scale of 1-5 (1 = not important, 5 = very important) the importance of measuring the following in their LFS:

- Non-market activities
 - Swaziland – 4
 - Sudan – 5
 - Mozambique – 5
 - Uganda – 5
 - Malawi – 5
 - Liberia – 4
- Secondary jobs
 - Swaziland – 5
 - Sudan – 2
 - Mozambique – 1
 - Uganda – 3
 - Malawi – 3
 - Liberia – 2
- Informal sector employment
 - Swaziland – 5
 - Sudan – 4
 - Mozambique – 5
 - Uganda – 4
 - Malawi – 5
 - Liberia – 5

The responses guided the discussion on the QLFS questionnaire and how the questionnaire could be used in each of the countries. Stats SA has developed an excellent tool for collecting data on the labor force. The participating countries should take advantage of this experience and adopt the questions for their own use; however, it is critical that those questions are adopted to reflect each country's circumstances and needs. The QLFS questionnaire provides an outstanding guide that countries can use to develop a LFS questionnaire, but the participants must bear in mind that individual questions were designed and tested based on the needs of Stats SA. All questions adopted for use in their own countries should reflect individual country data needs and circumstances.

Using the QLFS questionnaire as a guide, the participants were asked whether questions have been asked to identify informal production units. Questions 4.16 and 4.17 identify informal production units. Question 4.16 asks for the number of workers in the place of

work, while question 4.17 asks respondents to identify whether they would classify their place of work in the formal sector, informal sector, or private household.

The participants were then asked whether the QLFS questionnaire identified informal workers. Questions 4.6 through 4.14 ask employees to identify whether the employer provides benefits, contributes to the unemployment insurance fund, deducts income tax from his/her salary, and if employment is based on a written contract or verbal agreement.

Next, the participants were asked if the QLFS questionnaire identifies secondary jobs. Question 4.1 asks employed persons if they had more than one job or business in the last week. This is the only question related to secondary jobs, as Stats SA is not interested in collecting these data. The consultant asked the participants to identify what additional data could be collected on secondary jobs. Questions could be added to collect data on what type of work is done, hours worked, whether the place of work is formal or informal, and whether the employment is based on a written contract or verbal agreement.

Finally, the participants were asked if the QLFS questionnaire collected data on non-market activities, including subsistence. The QLFS only asks the unemployed whether or not they have worked for pay or profit or helped unpaid in a household business. Given the stated importance of collecting data on non-market activities, the participants were asked how these data could be collected. All respondents, regardless of status and activity, could be asked whether or not they have worked for pay or profit or helped unpaid in a household business. Questions also could be added to collect data on the types of activities, hours worked, and income.

The participants noted that no questions are asked on the QLFS related to income. The countries in attendance agreed that income data are important.

The GDDS manager emphasized the value of using the experience of Stats SA in developing a LFS questionnaire. Questions can and should be adopted from the QLFS; however, take care to ensure that the questions are adopted to meet individual country data needs. If collecting data on secondary jobs or income is important, the LFS questionnaire should be drafted accordingly.

2.2.8 Tabulation and analysis

Stats SA has developed standard set of tables that will be produced each quarter, and the participants were very interested to discuss in more detail the types of data included on each table and why these data were included. The main advantage of creating standard tables is that the standardized format facilitates a more rapid production and tabulation process. The new tabulation plan can be processed in two (2) weeks time.

2.2.9 Data processing

Overall, the participants were very impressed with the organization of the DPC of Stats SA, especially the tracking capabilities at each step of processing and the scanning of all

questionnaires. Participants were especially intrigued by the imputation methods used by Stats SA to account for missing data. Following the presentation, the participants toured the DPC to experience, first hand, the activities discussed during the presentation.

3 Country presentations

3.1 Country status reports

During the launch workshop held in Kampala, Uganda, in May 2007, each participating country identified up to three (3) priorities that would guide their work throughout the duration of this project. Each country group was provided with a template to guide the development of a report on the status of work completed to date and future work plans for each of their stated priorities. A copy of the template is included in Annex I.

Individual country responses are included as follows:

- Liberia – Annex I.1
- Malawi – Annex I.2
- Mozambique – Annex I.3
- Sudan – Annex I.4
- Swaziland – Annex I.5
- Uganda – Annex I.6

4 Work sessions and discussions

Work sessions and discussions were held following each presentation on the following topics:

- Survey Design
- Sample Design
- Questionnaire Content and Design
- Data Collection
- Data Processing
- Data Tabulation
- Data Analysis
- Data Dissemination

Each country group was asked to complete a specified task for each topic and report in plenary. Feedback and questions from the staff of Stats SA, the GDDS Manager, and the consultant followed each country report.

A copy of each work session assignment is included in Annex J. Country reports, follow-up questions and comments are included in Annexes J.1 to J.5.

Note: The work session tasks for data processing were discussed during the presentation on Data Processing at the Stats SA Data Processing Center; therefore, no additional comments are included.

5 Workshop evaluation

The workshop evaluation indicated an overall score of 4.6 out of a possible 5. Participants were very pleased with the organization of the workshop, as was evident in the 4.8 score in response to question 6, Section A, “*The Workshop was well organized.*” Responses to section A (Workshop in general) were overwhelmingly positive. Of the seven (7) questions asked, four (4) received an average score of 4.8 each. These high scores reflect the participants’ views that the presentations were of interest, discussions with colleagues were useful, and discussing the experiences of Stats SA was helpful. The lowest average score (4.2) was in response to question 9, Section B, “*Future steps to be taken were clearly explained.*” Overall, the participants found the workshop to be very useful (Q. A1) as is reflected in the 4.8 average score.

Overall, the written comments were enthusiastic and positive. The participants indicated that they found the workshop to be well organized and useful, but that the duration could have been longer. All participants included written comments in Section C. See Annex K and Annex K.1.

Annex A: List of participants:

1	LIBERIA	Mr. George Saah
2	LIBERIA	Mr. Kehleboe Gongloe
3	LIBERIA	Mr. Daoudah M. Kromah
4	SWAZILAND	Mr. Bernard Tsela
5	SWAZILAND	Mr. Robert Nkhosingiphile Fakudze
6	MOZAMBIQUE	Mr. Domingos Massassa
7	MOZAMBIQUE	Mr. Antonio Muchine
8	MOZAMBIQUE	Mr. Antonio Joao Azize
9	MALAWI	Mr. Medson R.E. Makwemba
10	MALAWI	Mr. Frank Matumula
11	MALAWI	Mr. Robin Karonde
12	SUDAN	Mrs. Hanim Burhaneldin
13	SUDAN	Ms. Thorya Hamad Farah
14	SUDAN	Mrs. Elsham Mohamed Hamid
16	UGANDA	Mr. Vincent Fred Ssenono
17	UGANDA	Mr. Stephen Baryahirwa
18	UGANDA	Mr. Wilson Nyegenye
19	STATS SA	Ms. Yandi Mpetsheni
20	Bureau of Labor Statistics	Mr. Brian Graf
21	WORLD BANK	Mr. Ronald Luttikhuizen

Annex B: Agenda

**Workshop
On
Designing Labor Surveys and
Measuring the Informal Sector**

**Labor Statistics Module
GDDS Phase II Project
World Bank**

Pretoria, South Africa

May 19-23, 2008

Organizer and Chair: Ronald Luttkhuizen, GDDS Manager, World Bank

Monday, May 19

9:00 am	<i>Introductions and Administrative Issues</i> Yandi Mpetsheni, Statistics South Africa (Stats SA) Brian Graf, Bureau of Labor Statistics (BLS) Ronald Luttkhuizen, GDDS Manager, World Bank (WB)
10:00 am	<i>Status Reports from Participating Countries</i> Participants
1:00 pm	<i>Lunch</i>
2:30 pm	<i>Overview of Labor Force Survey for South Africa</i> Yandi Mpetsheni, Stats SA
3:30 pm	<i>Overview of Informal Sector Survey for South Africa</i> Joyce Lestrade-Jefferis, Stats SA
4:30 – 6:30 pm	<i>Classification of Paid and Unpaid Activities and Overview Of Measuring Informal Employment</i> Ronald Luttkhuizen, WB
7:00 pm	<i>Opening and Welcome</i> Pali Lehohla, Statistician-General Statistics South Africa

Tuesday, May 20

9:00 am *Survey Design*
Peter Buwembo, Stats SA

11:00 am *Sample Design*
Bhekisipho Twala, Stats SA

1:00 pm *Lunch*

2:30 – 5:30 pm *Work sessions and Discussion – Survey Design and Sample Design*
Yandi Mpetsheni, Stats SA
Brian Graf, BLS
Ronald Luttikhuizen, WB

Wednesday, May 21

9:00 am *Questionnaire Content and Design*
Malerato Mosiane, Stats SA

1:00 pm *Lunch*

2:30 – 5:30 pm *Work sessions and Discussion – Questionnaire Design*
Yandi Mpetsheni, Stats SA
Brian Graf, BLS
Ronald Luttikhuizen, WB

Thursday, May 22

9:00 am *Review and Discussion of Questionnaire, Quarterly Labor Force Survey, Stats SA*
Ronald Luttikhuizen, WB

10:30 am *Data Collection*
Dion Pietersen, Stats SA

11 :30 am *Work session and Discussion – Data Collection*
Yandi Mpetsheni, Stats SA
Brian Graf, BLS
Ronald Luttikhuizen, WB

1:00 pm *Lunch*

2:00 *Data Processing*
Mahier Hattas, Stats SA

3:00 – 5:30 pm *Tour of Data Processing Center, Statistics South Africa*

Friday, May 23

9:00 am *Tabulation and Analysis of Data*
Joyce Lestrade-Jefferis, Stats SA

10 :00 am *Work session and Discussion -- Tabulation*
Yandi Mpetsheni, Stats SA
Brian Graf, BLS
Ronald Luttkhuizen, WB

11:00 am *Dissemination of Data*
Peter Buwembo, Stats SA

12:00 *Work session and Discussion – Data Dissemination*
Yandi Mpetsheni, Stats SA
Brian Graf, BLS
Ronald Luttkhuizen, WB

1:00 pm *Lunch*

2:30 – 5:30 pm *Wrap-up and Conclusion*
Yandi Mpetsheni, Stats SA
Brian Graf, BLS
Ronald Luttkhuizen, WB

Annex C:

**World Bank GDDS Phase 2 Project
Labor Market Statistics Module - Reader**

Table of Contents

Pretoria Workshop.doc (Agenda)

Agenda.doc (Launch Workshop)

PowerPoint Presentations – Pretoria Workshop

Overview of Labour Force Survey for South Africa

Overview of Informal Sector – South Africa

Survey Design

Questionnaire Content and Design

Data Collection

Data Processing

Tabulation and Analysis

Dissemination

Resource Materials from Statistics South Africa

Quarterly Labor Force Survey Documents

QLFS Operations Calendar

Additional Materials from Launch Workshop (Kampala, May 2007)

Internet Resources.doc

Labor Market Indicators Matrix (Checklist.xls)

Needs Assessment Checklist.xls

Report on Launch Workshop and Annexes

Analysis and Dissemination

Data and Metadata Presentation Handbook.pdf

Making Numbers Meaningful.pdf

Metadata Standards and Metadata Registries.pdf

Toward a Framework for Assessing Quality.pdf

Using Quality Measures.pdf

CSPro

CSPro Getting Started Version 3.2

CSPRO User's Guide Version 3.2
CSPRO Data Entry User's Guide Version 3.2
CSPRO Release Notes Version 3.2

Indicators and Definitions

Research Papers:

Accounting for Business Births and Deaths in CES: Bias vs Net Birth-Death Modeling .pdf
BLS Use of Administrative Records.pdf
Comparisons of Job Openings Surveys.pdf
Definition of Informal Employment.pdf
Development of JOLTS.pdf
Family Background and Labor Market Outcomes - 1.pdf
Family Background and Labor Market Outcomes - 2.pdf
Family Background and Labor Market Outcomes - 3.pdf
Firm-wide vs Employment-Specific Labor Market Practices.pdf
ILO Decent Work Agenda for Africa.pdf
Incorporating Gender Issues.pdf
Interarea Wage Statistics.pdf
International Migration.pdf
JOLTS Overview.pdf
Labor Turnover and Employment.pdf

Indicators and Definitions (continued)

Research Papers (continued):

Male Female Wage Differentials.pdf
Measuring Demand for Labor.pdf
Measuring Employee Hours.pdf
Measuring Informal Sector and Informal Employment.pdf
Measuring Place of Work.pdf
Measuring Productivity.pdf
Measuring Public Service Employment.pdf
Minimum Wages and Employment.pdf
Occupation Specific Human Capital and Labor Markets.pdf
Systematic Approach to Hidden and Informal Activities.pdf
Time Series Data.pdf
Unit Labor Costs.pdf
Wage Adjustments.pdf
What Kind of Work.pdf
Worktime.pdf

Standards, Methods, and Definitions:

BLS Admin Data.pdf
BLS Compensation.pdf
BLS Emp Projections.pdf
BLS Est LF Survey.pdf
BLS Household LF Survey.pdf
BLS Household Income Exp Survey.pdf
BLS JOLTS.pdf
BLS Local Area Unemp.pdf
BLS Major Programs.pdf
BLS Occupational Emp Stats.pdf
BLS Productivity Measures Industry level.pdf
BLS Productivity Measures Major Sectors.pdf
Comparative Analysis - Wage Statistics.pdf
Comparative Methodologies - Econ Active Pop.pdf
ILO Training Module Labor Statistics.pdf
Measuring Informal Employment.pdf
Measuring Non-Observed Economy.pdf
OECD LF Statistics Comparisons of Concepts and Definitions.pdf
Part Time Work.pdf
Sources and Methods - Labor Force and Wage Statistics.pdf
Wage Statistics Comparative Analysis.pdf

PowerPoint Presentations

Detailed PowerPoint Presentations:

A Framework for Assessing Data Quality.ppt
Area sampling.PPT
Assessment and Improvement.ppt
Classifications and Structures.ppt
Informal Economy.ppt
QuestWrite.ppt
Sample Design, Selection, and Maintenance.ppt
Sampling of establishments.PPT
Survey Methods (data collection).ppt
Survey Methods Seminar.ppt
Visual Forms Design.ppt

Overview PowerPoint Presentations:

A Framework for Assessing Data Quality.ppt
Analysis of Data.ppt
Assessment and Improvement.ppt
Classifications and Structures.ppt

Data Dissemination Practices.ppt
Informal Economy.ppt
Sample Design, Selection, and Maintenance.ppt
Survey Methods (data collection).ppt
Visual Forms Design.ppt
What is LMI.ppt
Writing Effective Questions for Interviews and Questionnaires.ppt

Survey Methods

Statistical Methods:

Adjusting for Non-Response.pdf
Alternative Imputation – Wage Data.pdf
Alternative Imputation Techniques.pdf
Basic Principles of Classification.pdf
BLS Estimation of hours and earnings.pdf
BLS Imputation Methods - Employment Data.pdf
Data Estimation for BLS Est LF Survey.pdf
Developing Estimates of Hires and Separations.pdf
Developing National Classification of Occupations.pdf
Impact of Non-Response on BLS Establishment Surveys.pdf
Maintaining and Revising Classifications.pdf
Mapping National Classification into ISOC.pdf

Survey Methods (continued)

Statistical Methods (continued):

Measurement of Design Effects.pdf
Non-Response.pdf
Quality vs. Timeliness.pdf
Sampling and Reporting in Time Use Surveys.pdf
Sampling Issues.pdf
Sampling Methods.pdf
Sampling.pdf
Seasonal Adjustment.pdf
Two Phase Sample Design - Canada.pdf

Survey Design:

Collecting Economic Characteristics in a Census.pdf
Coordination of PPS Sampling Overtime.pdf
Data Collection Issues.pdf
Designing Establishment Survey Questions.pdf
Effect of Incentives on Response Rates.pdf
Electronic Data Collection.pdf

Email and Internet Data Collection.pdf
Questionnaire Design - Business Survey.pdf
Respondent Burden.pdf
Response Burden in Denmark.pdf
Usability Tests.pdf
Using the Web to Collect Business Data.pdf
Using Total Quality Management to Improve Stats.pdf
Web Data Collection.pdf
Web vs. Paper Questionnaire.pdf
Writing Letters to Improve Response Rates.pdf

Other

Editing Data - Stats Netherlands.pdf
Editing Data Collected via Internet.pdf
Evaluating Data Quality - Est Survey.pdf
Improving Timeliness of Short-term Statistics.pdf
Overview of Data Editing Procedures at BLS.pdf
Principles Governing International Statistical Activities.pdf
What is a Survey.pdf

Annex D: Checklist

**World Bank GDDS Phase2 Project
Workshop on Labor Survey Design and Informal Sector
Pretoria, South Africa
May 19-23, 2008**

CHECKLIST

1. Survey Design			Country-specific Responses
Each of the following should be clearly identified when designing a survey:	Statistics Netherlands Methods	Data Quality Assessment Framework (DQAF)	Country-specific Responses
What do we want to measure?	Definitions	0. Prerequisites of quality	
Who is being measured? (units)	Classifications	1. Assurances of quality	
When? (frequency)	Goal	2. Methodological soundness	
Where? (areas)	Research population	3. Accuracy and reliability	
How will we measure these data?	Observation unit	4. Serviceability	
Goal of survey (clear and specific):	Frequency	5. Accessibility	
2. Sampling Design			Country-specific Responses
Identify sample unit	Classifications	0. Prerequisites of quality	
Identify sample frame	Research population	1. Assurances of quality	
1. Does the sample frame exist?	Observation unit	2. Methodological soundness	
2. Do we need to create a sample frame?	Sample size	3. Accuracy and reliability	

3. Source(s) of new sample frame	Raising and weighting	4. Serviceability	
Sampling methods	Methods used	5. Accessibility	
1. Probability			
2. Non-probability			
Describe sampling selection methods			

3. Questionnaire Design

Briefly describe survey purpose	Definitions	0. Prerequisites of quality	
Provide the following general information to respondent:	Classifications	1. Assurances of quality	
1. How long to complete?	Goal	2. Methodological soundness	
2. Are responses confidential?	Research population	3. Accuracy and reliability	
3. To request cooperation, explain the following:	Observation unit	4. Serviceability	
a. How was respondent selected?	Methods used	5. Accessibility	
b. Why is survey important?	Frequency		
c. Are all questions relevant?			
Is consistent communication with respondent maintained?			
Clear format for response			
Order of questions			
1. Logical to respondent?			
2. Most important to least important			
3. Demographic/sensitive questions at end			
Clear visual layout (font, colors, etc)			

4. Data collection

Unit?	Classifications	0. Prerequisites of quality	
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Method	Research population	1. Assurances of quality 2. Methodological soundness
1. Personal visit	Observation unit	
2. Telephone	Response	3. Accuracy and reliability
3. Mail	Methods	4. Serviceability
4. Fax		5. Accessibility
5. Internet		
6. Touch tone data entry		
7. Validation procedures		
8. Other (describe)		

5. Data Processing		
Data base? (identify) Excel?	Classifications	0. Prerequisites of quality
Are data complete?	Research population	1. Assurances of quality
Are data missing?	Response	2. Methodological soundness
1. Describe method(s) for treatment of missing data	Raising and weighting	3. Accuracy and reliability
Validation of data	Methods	4. Serviceability
	Frequency	5. Accessibility
1. Method(s) used to validate data		
2. Within normal tolerance?		
3. Do data make sense?		

6. Tabulation/Estimation of Data		
Sample?	Classifications	0. Prerequisites of quality
Census?	Sample size	1. Assurances of quality
Weights?	Response	2. Methodological soundness
Data measure levels?	Raising and weighting	3. Accuracy and reliability

Data measure changes?	Methods	4. Serviceability
Do data make sense/seem logical?	Research	5. Accessibility

7. Analysis		
Explain what is happening	Classifications	0. Prerequisites of quality
1. Movement over time	Response	1. Assurances of quality
2. Compare groups	Frequency	2. Methodological soundness
3. Trends in industries, occupations, etc.	Research	3. Accuracy and reliability
Met needs of data users?		4. Serviceability
1. Governments		5. Accessibility
2. Central banks		
3. Financial markets		
4. Labor and business groups		
5. Academics and researchers		
Organize user advisory groups		
1. Regular meetings with user advisory groups?		

8. Dissemination		
Press release	Classification	0. Prerequisites of quality
1. Frequency	Frequency	1. Assurances of integrity
Detailed bulletin	Research	3. Accuracy and reliability
1. Frequency		4. Serviceability
Web site		5. Accessibility
Phone and email requests		
Micro-data research		
Release of metadata		

ANNEX D1

**DATA QUALITY ASSESSMENT FRAMEWORK—GENERIC FRAMEWORK
(JULY 2003 FRAMEWORK)**

Quality Dimensions	Elements	Indicators
<p>0. Prerequisites of quality</p>	<p>0.1 Legal and institutional environment—<i>The environment is supportive of statistics</i></p> <p>0.2 Resources—<i>Resources are commensurate with needs of statistical programs.</i></p> <p>0.3 Relevance—<i>Statistics cover relevant information on the subject field.</i></p> <p>0.4 Other quality management—<i>Quality is a cornerstone of statistical work.</i></p>	<p>0.1.1 The responsibility for collecting, processing, and disseminating the statistics is clearly specified.</p> <p>0.1.2 Data sharing and coordination among data-producing agencies are adequate.</p> <p>0.1.3 Individual reporters' data are to be kept confidential and used for statistical purposes only.</p> <p>0.1.4 Statistical reporting is ensured through legal mandate and/or measures to encourage response.</p> <p>0.2.1 Staff, facilities, computing resources, and financing are commensurate with statistical programs.</p> <p>0.2.2 Measures to ensure efficient use of resources are implemented.</p> <p>0.3.1 The relevance and practical utility of existing statistics in meeting users' needs are monitored.</p> <p>0.4.1 Processes are in place to focus on quality.</p> <p>0.4.2 Processes are in place to monitor the quality of the statistical program.</p> <p>0.4.3 Processes are in place to deal with quality considerations in planning the statistical program.</p>
<p>1. Assurances of integrity</p> <p><i>The principle of objectivity in the collection, processing, and dissemination of statistics is firmly adhered to.</i></p>	<p>1.1 Professionalism—<i>Statistical policies and practices are guided by professional principles.</i></p> <p>1.2 Transparency—<i>Statistical policies and practices are transparent.</i></p> <p>1.3 Ethical standards—<i>Policies and practices are guided by ethical standards.</i></p>	<p>1.1.1 Statistics are produced on an impartial basis.</p> <p>1.1.2 Choices of sources and statistical techniques as well as decisions about dissemination are informed solely by statistical considerations.</p> <p>1.1.3 The appropriate statistical entity is entitled to comment on erroneous interpretation and misuse of statistics.</p> <p>1.2.1 The terms and conditions under which statistics are collected, processed, and disseminated are available to the public.</p> <p>1.2.2 Internal governmental access to statistics prior to their release is publicly identified.</p> <p>1.2.3 Products of statistical agencies/units are clearly identified as such.</p> <p>1.2.4 Advanced notice is given of major changes in methodology, source data, and statistical techniques.</p> <p>1.3.1 Guidelines for staff behavior are in place and are well known to the staff.</p>

Quality Dimensions	Elements	Indicators
<p>2. Methodological soundness</p> <p><i>The methodological basis for the statistics follows internationally accepted standards, guidelines, or good practices.</i></p>	<p>2.1 Concepts and definitions—<i>Concepts and definitions used are in accord with internationally accepted statistical frameworks.</i></p> <p>2.2 Scope—<i>The scope is in accord with internationally accepted standards, guidelines, or good practices.</i></p> <p>2.3 Classification/sectorization—<i>Classification and sectorization systems are in accord with internationally accepted standards, guidelines, or good practices.</i></p> <p>2.4 Basis for recording—<i>Flows and stocks are valued and recorded according to internationally accepted standards, guidelines, or good practices</i></p>	<p>2.1.1 The overall structure in terms of concepts and definitions follows internationally accepted standards, guidelines, or good practices.</p> <p>2.2.1 The scope is broadly consistent with internationally accepted standards, guidelines, or good practices.</p> <p>2.3.1 Classification/sectorization systems used are broadly consistent with internationally accepted standards, guidelines, or good practices.</p> <p>2.4.1 Market prices are used to value flows and stocks.</p> <p>2.4.2 Recording is done on an accrual basis.</p> <p>2.4.3 Grossing/netting procedures are broadly consistent with internationally accepted standards, guidelines, or good practices.</p>
<p>3. Accuracy and reliability</p> <p><i>Source data and statistical techniques are sound and statistical outputs sufficiently portray reality</i></p>	<p>3.1 Source data – <i>Source data available provide an adequate basis to compile statistics.</i></p> <p>3.2 Assessment of source data—<i>Source data are regularly assessed.</i></p> <p>3.3 Statistical techniques—<i>Statistical techniques employed conform to sound statistical procedures</i></p> <p>3.4 Assessment and validation of intermediate data and statistical outputs—<i>Intermediate results and statistical outputs are regularly assessed and validated.</i></p> <p>3.5 Revision studies—<i>Revisions, as a gauge of reliability, are tracked and mined for the information they may provide.</i></p>	<p>3.1.1 Source data are obtained from comprehensive data collection programs that take into account country-specific conditions.</p> <p>3.1.2 Source data reasonably approximate the definitions, scope, classifications, valuation, and time of recording required.</p> <p>3.1.3 Source data are timely.</p> <p>3.2.1 Source data—including censuses, sample surveys, and administrative records—are routinely assessed, e.g., for coverage, sample error, response error, and nonsampling error; the results of the assessments are monitored and made available to guide statistical processes.</p> <p>3.3.1 Data compilation employs sound statistical techniques to deal with data sources.</p> <p>3.3.2 Other statistical procedures (e.g., data adjustments and transformations, and statistical analysis) employ sound statistical techniques.</p> <p>3.4.1 Intermediate results are validated against other information where applicable.</p> <p>3.4.2 Statistical discrepancies in intermediate data are assessed and investigated.</p> <p>3.4.3 Statistical discrepancies and other potential indicators or problems in statistical outputs are investigated.</p> <p>3.5.1 Studies and analyses of revisions are carried out routinely and used internally to inform statistical processes (see also 4.3.3).</p>

Quality Dimensions	Elements	Indicators
<p>4. Serviceability <i>Statistics, with adequate periodicity and timeliness, are consistent and follow a predictable revisions policy.</i></p>	<p>4.1 Periodicity and timeliness— <i>Periodicity and timeliness follow internationally accepted dissemination standards.</i></p> <p>4.2 Consistency— <i>Statistics are consistent within the dataset, over time, and with major datasets.</i></p> <p>4.3 Revision policy and practice—<i>Data revisions follow a regular and publicized procedure.</i></p>	<p>4.1.1 Periodicity follows dissemination standards. 4.1.2 Timeliness follows dissemination standards.</p> <p>4.2.1 Statistics are consistent within the dataset. 4.2.2 Statistics are consistent or reconcilable over a reasonable period of time. 4.2.3 Statistics are consistent or reconcilable with those obtained through other data sources and/or statistical frameworks.</p> <p>4.3.1 Revisions follow a regular and transparent schedule. 4.3.2 Preliminary and/or revised data are clearly identified. 4.3.3 Studies and analyses of revisions are made public (see also 3.5.1).</p>
<p>5. Accessibility <i>Data and metadata are easily available and assistance to users is adequate.</i></p>	<p>5.1 Data accessibility— <i>Statistics are presented in a clear and understandable manner, forms of dissemination are adequate, and statistics are made available on an impartial basis.</i></p> <p>5.2 Metadata accessibility— <i>Up-to-date and pertinent metadata are made available.</i></p> <p>5.3 Assistance to users— <i>Prompt and knowledgeable support service is available.</i></p>	<p>5.1.1 Statistics are presented in a way that facilitates proper interpretation and meaningful comparisons (layout and clarity of text, tables, and charts). 5.1.2 Dissemination media and format are adequate. 5.1.3 Statistics are released on a preannounced schedule. 5.1.4 Statistics are made available to all users at the same time. 5.1.5 Statistics not routinely disseminated are made available upon request.</p> <p>5.2.1 Documentation on concepts, scope, classifications, basis of recording, data sources, and statistical techniques is available, and differences from internationally accepted standards, guidelines, or good practices are annotated. 5.2.2 Levels of detail are adapted to the needs of the intended audience.</p> <p>5.3.1 Contact points for each subject field are publicized. 5.3.2 Catalogs of publications, documents, and other services, including information on any changes, are widely available.</p>

**Unit is Time: Paid and Unpaid Labor Activities by Position in Production Unit
By Ronald Luttkhuizen, World Bank**

Labor Activity	Position in Production Unit	Type of Sector Formal / informal
<p style="text-align: center;">I. Paid Labor Activities</p> <p>1. Owner generating income</p> <p>1.1 Self-employed owner</p> <p style="padding-left: 20px;">1.1.1 Formal sector Enterprises/households</p> <p style="padding-left: 20px;">1.2.1 Informal sector Enterprises/households</p> <p>1.2 Other owner</p> <p style="padding-left: 20px;">1.2.1 Formal sector Enterprises/households</p> <p style="padding-left: 20px;">1.2.2 Informal sector Enterprises/households (link with SNA to be defined)</p>	Owner	<p>Formal</p> <p>Informal</p> <p>Formal</p> <p>Informal</p>
<p>2. Labor activity generating fully reported income (with contract – Formal labor)</p> <p style="padding-left: 20px;">2.1 CEO (non-owner)</p> <p style="padding-left: 20px;">2.2 Employee</p> <p>3. Labor activity generating partially unreported income (without contract)</p> <p style="padding-left: 20px;">3.1 Formal sector - Informal labor</p> <p style="padding-left: 40px;">3.1.1 Enterprise</p> <p style="padding-left: 40px;">3.1.2 Household</p> <p>4. Labor activity generating fully unreported income (without contract)</p> <p style="padding-left: 20px;">4.1 Formal sector - Informal labor</p> <p style="padding-left: 40px;">4.1.1 Enterprise</p> <p style="padding-left: 40px;">4.1.2 Household</p> <p style="padding-left: 20px;">4.2 Informal sector</p> <p style="padding-left: 40px;">4.2.1. Enterprise</p>	Employee	<p>Formal</p> <p>Formal</p> <p>Formal</p> <p>(link with SNA to be defined)</p> <p>Formal</p> <p>(link with SNA to be defined)</p> <p>Informal</p>

4.2.2 Household	Domestic workers (link with SNA to be defined)
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Annex E:

Paid and Unpaid Labor Activities by Position in Production Unit (continued)

Labor Activity	Position in Production Unit	Type of Sector Formal / Informal
<p align="center">II. Unpaid Labor Activities</p> <p>5. Unpaid family member in establishment/production units</p> <p> 5.1 Formal sector</p> <p> 5.2 Informal sector (Family enterprise)</p>	<p>Unpaid worker in production unit</p>	<p>Formal Informal</p>
<p>6. Production/service work for own household</p> <p> 6.1 Cooking, child and elder care, etc.</p> <p> 6.2 Construction, carrying water</p> <p> 6.3 Subsistence</p>	<p>Unpaid work for own consumption including subsistence</p>	<p>Household</p>
<p>7. Production/service work for other households</p> <p> 7.1 Cooking, child and elder care, etc.</p> <p> 7.2 Construction, carrying water</p> <p> 7.3 Subsistence</p>	<p>Unpaid work for consumption by others</p>	<p>Household</p>
<p>8. Volunteer work for nonprofit organization</p> <p> 8.1 Services</p> <p> 8.2 Construction</p>	<p>Unpaid work for nonprofit organization</p>	<p>Non profit</p>

Annex F:

Overview of Formal and Informal Units / Employment and Non-Market Activities
 Ronald Luttkhuizen, World Bank

<p>Population (age group) Work/non-work</p> <p>15-65 years of age 10-65 / 70 years of age</p> <p>Active Unemployed</p> <p>Inactive</p> <p>Labor Force</p> <p>several criteria (1) (2) -- search and availability</p>	<p>Agreed international standard</p> <p>Yes</p> <p>Criteria</p>
<p>Employed</p> <p>1 hour</p> <p>Market ---- Production Units Informal (SNA)</p> <p>1. size -- less than 5 working persons 2. registration -- depends on national needs a. Stats SA -- VAT registration b. Stats SA -- income tax registration 3. other -- on the street, etc.</p> <p>Labor market -- workers, jobs and hours</p> <p>Formal employment</p> <p>1. formal worker a. Enterprise b. HH -- domestic worker</p> <p>2. formal job</p> <p>3. formal hours worked</p>	<p>No standard for informal sector</p> <p>No standard for informal employment</p>

<p>Non-market activities -- those activities done by HH not for sale</p> <p>Productive/non-productive activities</p>	<p>(Outside SNA production boundary)</p>	<p>Yes -- Outside SNA production boundary, output to be included</p>
<p>Overview of Formal and Informal Units / Employment and Non-Market Activities (continued)</p>		
<p>Subsistence</p> <p>a. For own HH</p> <p>b. Provided to other HH</p> <p>Volunteer work -- non-profit organizations</p>		<p>Yes -- Outside SNA production boundary, output to be included</p> <p>No standard</p>

Subsistence -- views of participants

1. production for own use
 - a. Any production for pay/profit/in-kind = informal not subsistence
 - i. One apple criteria

National Accounts -- Institutional Sectors defined

Subsistence activities - those activities that are essential for the provision of goods as services as part of the economy
 no criteria defining substantial -- allows greater flexibility for countries -- based on national circumstances

Annex G1:

Slide 1

Data collection programmes: Data sources for the informal sector

Ralf Hussmanns
Head, Methodology and Analysis Unit
Bureau of Statistics
International Labour Office



Slide 2

Measurement objectives (1)

- Monitoring of informal (sector) employment: number & characteristics of persons involved, conditions of employment & work.
- Method: household surveys (labour force surveys).
- Reporting units: households.
- Observation units: household members.
- Periodicity: annual (if possible).

Slide 3

Measurement objectives (2)

- Measurement of number & characteristics of IS enterprises: employment, production, income generation, organisation & functioning, constraints & potentials, etc.
- Method: informal sector surveys (establishment surveys, mixed household & enterprise surveys).
- Reporting units: IS entrepreneurs.
- Observation units: IS enterprises.
- Periodicity: every 5 years (if possible).

Slide 4

LFS as source of data on employment in the informal sector and informal employment – Advantages (1)

- Low cost of including some additional questions relating to the definitions and characteristics of informal sector employment/informal employment.
- Periodic inclusion of such questions permits the number and characteristics of persons working in the IS or in IE, and the conditions of their employment and work, to be monitored over time.
- Macro-level data linkages with corresponding data on formal sector employment/formal employment unemployment and underemployment.

Slide 5

LFS as source of data on employment in the informal sector and informal employment – Advantages (2)

- Micro-level data linkages with all other data collected by the survey for the same respondent.
- Total population (or WAP) can be classified into employed, unemployed and economically inactive, and the employed by status in employment, formal/informal nature of the jobs, type of production units involved (formal/informal sector enterprises, households), etc.

Slide 6

LFS as source of data on employment in the informal sector and informal employment – Advantages (3)

- LFS can be used as first phase of a mixed household and enterprise survey on the informal sector (Tanzania, South Africa, 1-2-3, etc.).
- LFS data on informal sector employment can be used to evaluate data on informal sector employment obtained from surveys of informal sector enterprises (incl. data from 2nd phase of a mixed survey).
- LFS data on labour inputs to informal sector activities can be used to extrapolate less frequent data from specialised informal sector surveys on other characteristics (e.g. value added) of informal sector enterprises.

Slide 7

LFS – Design considerations (1)

- Additional questions relating to the definitions and characteristics of informal sector employment/informal employment to be asked of all employed persons irrespective of their status in employment, including employees and contributing family workers.
- LFS reaches employees of IS enterprises directly. But: For employees, questions on some of the enterprise characteristics may have to be formulated differently (unless estimates of employment in the IS are based on number of workers reported by owners of IS enterprises).

Slide 8

LFS – Design considerations (2)

- To avoid underestimation: Questions for identification of informal sector employment/informal employment to be asked in respect of the respondents' main and secondary jobs.
- Self-respondents and proxy-respondents should be able to answer these questions.
- Persons can be classified in the IS or IE only if they have been identified as employed in the first place:

Slide 9

LFS – Design considerations (3)

- Special probes needed on activities/jobs that might otherwise go unreported as employment (e.g. unpaid work in small family enterprises, home-based work, unregistered work, casual jobs, informal activities done as secondary jobs, etc.).
- To capture work of children in the informal sector/informal jobs, possible need to lower the age limit for measurement of the economically active population.
- Sample design: need to include in the sample an adequate number of areas where informal workers live.

Slide 10

LFS as source of data on the informal sector and informal employment – Limitations

- Unless LFS is undertaken at sufficiently frequent intervals or spread over a year, short reference period (one week) for measuring employment may not capture seasonal and other variations over time of informal sector activities/informal jobs.
- Business partnerships: difference between number of IS entrepreneurs and IS enterprises makes estimation of number of IS enterprises difficult (if not impossible).
- Depending on sample size and design, no detailed subclassifications of data possible (e.g. by industry).

Slide 11

Surveys of IS enterprises - Two types

- Establishment surveys
- Mixed household-enterprise surveys

Slide 12

IS establishment surveys - General

- IS enterprises usually not covered by existing establishment surveys.
- Countries with a large IS often do not have business registers.
- If business registers exist, they usually do not cover IS enterprises, or the information is not updated,
- as IS enterprises are too numerous, too small, too unstable, and unregistered.

Slide 13

IS establishment surveys - Sampling frame

- Census of IS establishments: coverage problems;
- Better: general establishment or economic census including questions for identification of IS enterprises.
- Branch-specific censuses: coverage problems;
- Better: census covering all branches of economic activity.

Slide 14

IS establishment surveys - Use of census data

- As list frame for selection of sample of IS establishments (if IS survey is conducted immediately after the census).
- For construction of area sampling frame for IS establishments (as spatial pattern of concentration of IS establishments is more stable than the IS establishments themselves):
- High mobility and turnover of IS enterprises require updating of the lists of establishments in the sample areas prior to selection of the FSUs for the IS survey.

Slide 15

IS establishment surveys - Problems (1)

- Human and financial resources: Large scale and high cost of undertaking an establishment or economic census.
- Incomplete coverage of the IS: Enterprises lacking recognisable business premises (e.g. home-based activities, units operating without fixed location) cannot be identified, unless the establishment/economic census is conducted concurrently with the house-listing operation for a population and housing census.

Slide 16

IS establishment surveys - Problems (2)

- **Separate collection of data for each establishment:** Problems to identify linkages between IS activities undertaken by the same individuals, households or enterprises, and to consolidate the data at the household or enterprise level.
- **Risk of double-counting of activities** (Example: households producing goods in a small workshop or at home, and selling these goods in a market or street stall).
- **Lack of data on characteristics of the households of IS entrepreneurs** (analysis of the situation of women working in the IS, poverty, etc.)

Slide 17

Mixed household-enterprise surveys - Principles

- Based on area sampling and conducted in two phases
- First phase (household survey component): sampling frame for IS enterprises (or small or unincorporated enterprises) is obtained through a household listing or household survey in the sample areas
- Identification of all enterprises falling within the scope of the survey and of their owners
- Second phase (enterprise survey component): sample or all of the enterprise owners are interviewed to obtain detailed information about them and their enterprises

Slide 18

Mixed household-enterprise surveys - Two types

- Independent (stand-alone) IS surveys
- IS modules attached to labour force or other household surveys: IS survey sample = sub-sample of base survey sample

Slide 19

Independent mixed IS surveys

- Are rather expensive
- and fairly complex in terms of survey operations, sample design and estimation procedures,
- but the preferred option when estimates of a specified reliability are needed for selected strata (e.g. for each branch of economic activity),
- as the sample can be designed and selected to meet such requirements.

Slide 20

Measurement of seasonal variations & estimation of annual values

- Use of short reference periods is imperative.
- Repeated interviews with the same respondents are usually impossible.
- **Solution 1** (individual level): data collection in respect of short reference periods, supplemented by questions on the variations in business activity over the year.
- **Solution 2** (aggregate level): data collection spread over a survey period of a whole year by dividing the survey sample into independent sub-samples for different parts of the year.

Slide 21

IS modules attached to household surveys

- **Principle:** IS survey sample is obtained as a sub-sample of a labour force survey (or other household survey).
- **Conditions:** Existence of a suitable base survey; feasibility (in terms of survey operations, response burden, etc.) of attaching an IS module to it.

Slide 22

IS modules attached to household surveys - Advantages (1)

- Modular approach is less complex and less costly than an independent ISS: sub-sample of households or persons for the ISS identified and selected on the basis of information collected during the LFS; no special household listing or interviewing required.
- Possibility to monitor evolution of the IS over time, if the LFS is conducted regularly and an IS module attached to it at sufficiently frequent intervals (South Africa: every 3 years).

Slide 23

IS modules attached to household surveys - Advantages (2)

- Possibility to achieve a complete coverage and accurate identification of IS entrepreneurs in the sample households: collection of the information as part of a LFS questionnaire.
- Estimation of survey results facilitated: Use of the LFS sampling weights for the households with IS enterprises.

Slide 24

IS modules attached to household surveys - Advantages (3)

- Possibility to link data on IS activities to the wide range of data obtained from the LFS.
- Possibility to compare data on IS employment obtained from 2nd survey phase with corresponding data from 1st survey phase.

Slide 25

IS modules attached to household surveys – Limitations (1)

- Short reference period (one week) of LFS for measuring employment as an IS entrepreneur unlikely to capture seasonal and other variations over time of IS activities:
- need to attach the IS module several times during the year or throughout the year (quarterly, monthly or continuous LFS), or to use a longer survey period such as one year (annual or less frequent LFS).

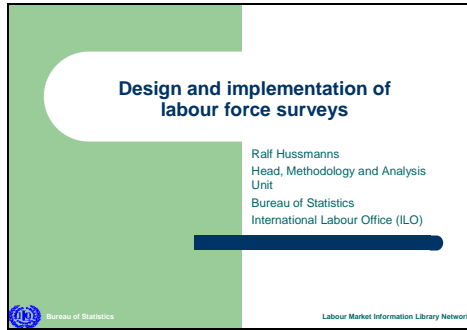
Slide 26

IS modules attached to household surveys – Limitations (2)

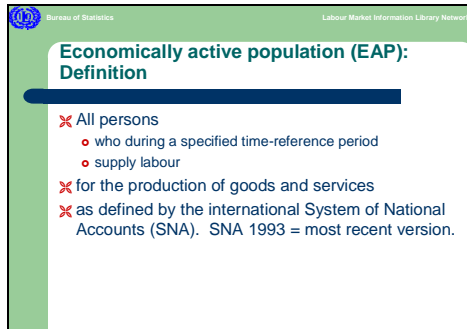
- Possibilities for disaggregating the data (e.g. by industry) depend upon sample size and design.
- LFS sample not likely to have been efficiently designed for IS measurement, neither at the level of sample areas nor at the level of sample households.
- No control over the size of the IS sample, or over its distribution by type of activity.
- Number of IS entrepreneurs in the sample may be quite small, and insufficient to yield reliable estimates for each type of IS activity, for which such estimates would be desirable (e.g. estimates by industry).

Annex G2:

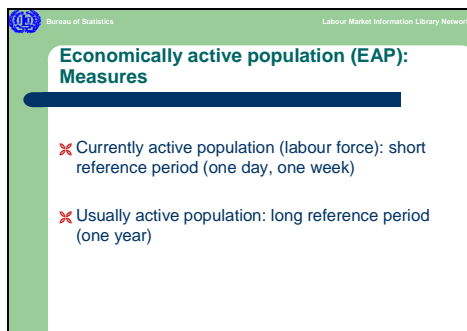
Slide 1



Slide 2



Slide 3



Slide 4

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Usually active population

- ✗ Data quality problems due to recall errors
- ✗ Nevertheless useful measurement framework in annual or less frequent LFSs not covering a whole-year survey period
- ✗ Analysis of current activity status cross-classified by usual activity status

Slide 5

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Currently active population (labour force)

- ✗ Definition:
 - all persons who were
 - employed or unemployed
 - during a short reference period (e.g. one week, one day)
- ✗ Labour force = employed persons + unemployed persons

Slide 6

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Labour force framework (1)

- ✗ Main features:
 - Small number of categories (employed, unemployed, not economically active)
 - Categories exhaustive and mutually exclusive
 - Joint measurement of the categories (household surveys)
 - Priority rules: 1. Employment, 2. Unemployment, 3. Economic inactivity
 - Activity principle (work, active job search) ensures objectivity of measurement
 - Short reference period minimizes recall errors and improves data accuracy

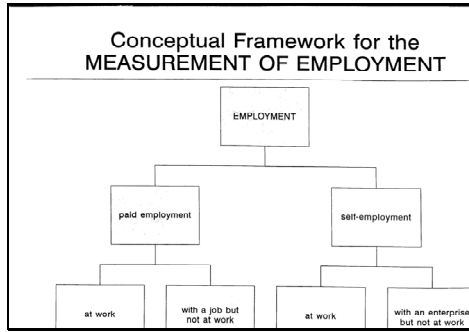
Slide 7

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Labour force framework (2)

- ✗ Employed, unemployed, not economically active: top level of classification by labour force status.
- ✗ Important sub-classifications:
- ✗ **Employed:** fully employed vs. underemployed, quality of employment (income, skill utilisation, job security, legal & social protection, etc.).
- ✗ **Unemployed:** first job seekers vs. persons with previous work experience, duration of unemployment, coverage by unemployment insurance, etc.
- ✗ **Not economically active:** degree of labour market attachment (e.g. discouraged workers).

Slide 8



Slide 9

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Employment: Persons at work

- ✗ **Definition:**
 - Persons who, during the reference period, performed some work
 - for wage or salary, or profit or family gain,
 - in cash or in kind.
 - "Work": engagement in production (as defined in the SNA)
 - "Some" work: work for at least one hour during the reference period

Slide 10

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Employment: Inclusion of ...

- ✗ All status-in-employment categories: employees, employers, own-account workers, contributing family workers, members of producers' cooperatives
- ✗ All types of employment incl. short-time and part-time work, casual and temporary employment, informal employment, employment in the informal sector
- ✗ Employed persons looking for another or additional job
- ✗ Employed persons registered as unemployed
- ✗ Students, housewives/men, pensioners, etc., who were employed during the reference period

Slide 11

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One-hour criterion

- ✗ Reasons:
 - Inclusion of all employment in accordance with priority rules of labour force framework
 - Coherence between production and employment statistics: measurement of total production and total labour inputs
 - Definition of unemployment as a situation of total lack of work (zero hours of work during reference period)
 - Other definition of unemployment not accepted at the international level
 - Definition of time-related underemployment (= partial lack of work) as a sub-category of employment

Slide 12

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One-hour criterion

- ✗ Implications
 - Dilution of the employment concept as basis for labour market and social policy purposes (similar to the effect of inclusion of production of goods for own final use)
 - Need for data collection on hours of work, working-time arrangements, time-related underemployment, etc.
 - Usefulness of measuring volume of employment (employed persons x hours of work) in addition to number of employed persons
- ✗ Note: In spite of much criticism of the one-hour criterion, the ICLS has always reconfirmed it.

Slide 13

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Non-economic productive activities (unpaid services for one's own household, volunteer non-market services)

- ✗ Possibility to attach module for all persons (employed, unemployed, inactive) to LFS questionnaire (examples: Brazil, Switzerland, etc.);
- ✗ Engagement in the various types of non-economic productive activities during reference period;
- ✗ Number of hours spent on them.

Slide 14

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Questionnaire design and application: Persons at work (1)

- ✗ Understanding of terms used
 - o Difference: statistical terms/colloquial language
 - o Examples: 'work', 'job', 'business', etc.
- ✗ Questionnaire refinement
 - o Be aware of importance of leading questions
 - o Avoid 'What did ... mainly do during the last week?'
 - o Include probing questions on marginal, casual, informal, unpaid, etc. activities, or an activity list

Slide 15

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Activity List (Tanzania, Labour Force Survey 1990/91)

ASK ALL PERSONS 15 YEARS AND OVER FROM LFS 1

INT: Please do not include the respondent's reporting of work activities. We are starting with unpaid activities during the last 12 months of year. Do not include any other work.

USUAL ACTIVITIES:

1. During the last 12 months, did you do any of the following work activities for your own household, family or business?

INT: Check through **yes/no** for each item.

<p>While doing the report, please tick each of the following work activities:</p> <p>Domestic work</p> <p>Part time 01</p> <p>Temporary/seasonal 02</p> <p>Activities</p> <p>Planting/working in a garden/plot/field 04</p> <p>Cooking 05</p> <p>Child care 06</p> <p>Household 07</p> <p>Task 08</p> <p>Child care 09</p> <p>Food crop: e.g. maize 10</p> <p>Vegetables 11</p> <p>Fruit 12</p> <p>Fruit, vegetables 13</p> <p>Other 14</p> <p>Other agricultural activities (excluding horticulture) 15</p> <p>Animal husbandry: e.g. raising of cattle 16</p> <p>Animal husbandry: e.g. raising of sheep 17</p> <p>Animal husbandry: e.g. raising of goats 18</p> <p>Animal husbandry: e.g. raising of pigs 19</p> <p>Animal husbandry: e.g. raising of chickens 20</p> <p>Animal husbandry: e.g. raising of other animals 21</p> <p>Other agricultural activities (excluding horticulture) 22</p>	<p>Manufacturing/Construction</p> <p>Making/repairing 23</p> <p>Other food processing e.g. canning, home brewing (not making) 24</p> <p>Home based manufacturing/processing/repairing 25</p> <p>Subsistence manufacturing/processing/repairing 26</p> <p>Other manufacturing/processing/repairing (not for home use) 27</p> <p>Construction</p> <p>Construction of buildings, roads, bridges, etc. 28</p> <p>Other construction activities 29</p> <p>Transport</p> <p>Engaged in sea, air, road transport work, etc. 30</p> <p>Transport work: e.g. driving a motor vehicle, etc. 31</p> <p>Transport work: e.g. driving a motor vehicle, etc. 32</p> <p>Transport work: e.g. driving a motor vehicle, etc. 33</p> <p>Transport work: e.g. driving a motor vehicle, etc. 34</p> <p>Transport work: e.g. driving a motor vehicle, etc. 35</p> <p>Transport work: e.g. driving a motor vehicle, etc. 36</p> <p>Transport work: e.g. driving a motor vehicle, etc. 37</p> <p>Transport work: e.g. driving a motor vehicle, etc. 38</p> <p>Transport work: e.g. driving a motor vehicle, etc. 39</p> <p>Transport work: e.g. driving a motor vehicle, etc. 40</p> 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Slide 16

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Questionnaire design and application: Persons at work (2)

- ✘ Avoidance of proxy responses (to the extent possible)
- ✘ Interviewer training and instructions
 - Explanation of questions and terms used
 - Indication of potential difficulties
 - Lists of common examples of activities to be included or excluded

Slide 17

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Treatment of particular groups (1)

- ✘ Contributing family workers (unpaid family workers)
 - at work = **employed** irrespective of number of hours worked during the reference period
 - temporarily not at work = **not employed** (cannot be « with an enterprise but not at work » because they do not have an enterprise of their own)
- ✘ Producers of goods for own final use by their household
 - = employed if output provides an important contribution to the total consumption of the household
 - important contribution: usually measured in terms of labour input (number of hours of work)

Slide 18

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Treatment of particular groups (2)

- ✘ Apprentices
 - paid in cash or in kind = employed
 - unpaid and CFW = employed if at work
 - unpaid and not CFW = employed if contributing to production of goods or services by the enterprise
- ✘ Members of the armed forces
 - Regular members = employed
 - Temporary members (e.g. conscripts) = employed

Slide 19

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Treatment of particular groups (3)

- ✗ **Volunteers**
 - contributing to the production of **market or non-market goods** (e.g. construction of a private or public school) = employed
 - contributing to the production of **market services** (e.g. teaching in a private school) = employed
 - contributing to the production of **non-market services** (e.g. teaching in a public school) = not employed

Slide 20

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Definition: Persons in time-related underemployment (16th ICLS)

- ✗ All persons who, during the reference period,
 - ✗ were *willing* to work additional hours (in their current, in additional or in other job(s)),
 - ✗ *available* to work additional hours,
 - ✗ and whose hours *actually* worked in *all* jobs during the reference period were below a threshold to be chosen according to national circumstances (e.g. full-time work, 40 or 35 hours).

Slide 21

Bureau of Statistics Labour Market Information Library Network

Definition: Volume of time-related underemployment (16th ICLS)

- ✗ The additional time (expressed in units of working days, half-days or hours) that persons in time-related underemployment were willing and available to work during the reference period, up to the chosen threshold.
- ✗ **Note:** Unlike the headcount of persons in time-related underemployment, the volume measure accounts for the fact that the desired number of additional hours of work varies among persons.

Slide 22

Bureau of Statistics Labour Market Information Library Network

Unemployment: Criteria of standard definition

- ✗ **WITHOUT WORK:**
 - not in paid employment or self-employment during reference period
- ✗ **CURRENTLY AVAILABLE FOR WORK:**
 - available for paid employment or self-employment during reference period
- ✗ **SEEKING WORK:**
 - specific steps taken in a specified recent period (e.g. last four weeks) to seek paid employment or self-employment

Slide 23

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Active steps to seek work (1)

- ✗ Registration at a public or private employment exchange (for purposes of obtaining a job offer)
- ✗ Application to employers
- ✗ Checking at worksites, farms, factory gates, market or other assembly places
- ✗ Placing or answering newspaper advertisements
- ✗ = *Formal methods of job search*

Slide 24

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Active steps to seek work (2)

- ✗ Seeking assistance of friends or relatives
- ✗ Looking for land, building, machinery or equipment to establish own enterprise
- ✗ Arranging for financial resources
- ✗ Applying for permits, licenses, etc.
- ✗ = *Informal methods of job search and methods to seek self-employment*

Slide 25

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Unemployment: Standard definition

- ✗ **Incl.:** 'Future starters', if currently available for work
- ✗ **Incl.:** Students, housewives/men, pensioners, etc., who are actively seeking work and currently available for work
- ✗ **Excl.:** Employed persons looking for another or additional job
- ✗ **Excl.:** Persons without work, who are not actively seeking work and/or not available for work (e.g. discouraged workers)

Slide 26

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Unemployment: Relaxed definition

- ✗ **Conditions for relaxing the seeking work criterion:**
 - conventional means of seeking work are of limited relevance;
 - labour market is largely unorganised or of limited scope;
 - labour absorption is at the time inadequate;
 - labour force is largely self-employed
- ✗ **Complete relaxation vs. partial relaxation**
- ✗ **Partial relaxation: question on reason for not seeking work**

Slide 27

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Seeking work criterion: Examples for partial relaxation

- ✗ Persons temporarily laid off without formal job attachment
- ✗ Persons awaiting replies from employers or the results of competitions
- ✗ Discouraged workers
- ✗ Seasonal workers not at work during the off-season

Slide 28

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Current availability for work

✘ When the seeking work criterion is relaxed, tests of availability should be made using questions on:

- willingness to take up work for wage or salary on locally prevailing terms:
 - remuneration, working time, location, industry, occupation, etc.
- readiness to undertake self-employment activity if given the necessary resources and facilities
- readiness to take up work in a place other than the current place of residence
- etc.

Slide 29

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Unemployment and other measures of labour underutilization

✘ Three possibilities if standard definition of unemployment is considered too narrow:

- ✘ 1. Use of a relaxed definition of unemployment (example: Tanzania)
- ✘ 2. Parallel use of the standard and a relaxed definition (example: South Africa)
- ✘ 3. Use of the standard definition of unemployment plus supplementary measure(s) of labour underutilization (example: Mexico)

Annex H:

**Overview of Select Topics to be Considered for Labor Force Survey
Questionnaire**

Ronald Luttikhuizen, World Bank

List of topics

HH box
Formal vs. Informal employment
Formal vs. Informal production unit
Non-market activities
Unemployment

HH Box / Section 1

Add aspect of migrants

Main Activities / Section 2

2.4 Status definition

2.5 Not working but returning to work

2.6 Non-market activities Only answered by unpaid
workers

2.7 Not present / absent from work (reasons)

Non-market activities -- if important questions should be asked
of all respondents

Formal employment versus informal
employment

1 hour or more during the reference period -- status (employee, employer,
unpaid worker)

Criteria to identify formal or informal -- written contract -- 4.11

Stats SA 4.6 - 4.12 -- specific information
on status with employer

Essential to make distinction between
written or no contract

Formal versus informal production units

Where do they work?

Is it an informal unit?

Considerations

Place of work / sector of work -- 4.15, 4.3b (industrial
classification)

Size -- 4.16

Self assessment of unit -- 4.17

Objective measure -- registration status -- 4.13, 4.14

Job / work -- formal and informal employment (criteria = written contract)

Primary Job or secondary job

Primary Job

type of work -- occupation
duties -- more detailed
information
hours worked

usual vs actual hours
worked

wages

hourly, daily, weekly, monthly, annually
(not most relevant)

Secondary job

type of work -- occupation
duties -- more detailed
information
hours worked

usual vs actual hours
worked

wages

hourly, daily, weekly, monthly, annually
(not most relevant)

where -- location, place of
work

Annual questionnaire -- more detailed

Non-market activities

Who is involved in non-market activities?

How important is it to measure non-market activities?

Define -- observe those non-market activities that the SNA allows and these activities should be considerable/important

Ask limited group (unemployed or unpaid) or for all respondents

Do we need to know if these activities are shared with other HH

Check question -- what part of production is sold on market

Voluntary

work

where, what, and how many hours

Unemployment

t

Criteria

1. not working during the reference period
2. looking for work according to defined criteria
3. available for work

Information on previous work

Annex I:

**World Bank GDDS Phase2 Project
Workshop on Labor Survey Design and Informal Sector
Pretoria, South Africa
May 19-23, 2008**

COUNTRY REPORT: PROGRESS AND PLANS

Priority 1:

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Priority 2:

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Priority 3:

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Annex I.1.

**World Bank GDDS Phase2 Project
Workshop on Labor Survey Design and Informal Sector
Pretoria, South Africa
May 19-23, 2008**

COUNTRY REPORT: PROGRESS AND PLANS

LIBERIA

NOTE: The attendees representing Liberia did not attend the Launch Workshop in Kampala, Uganda, held in May 2007. Liberia has not received any technical assistance missions to date. The International Labor Office (ILO) has provided extensive assistance to Liberia and is coordinating with the World Bank to prevent a duplication of efforts. Technical assistance missions will be forthcoming.

Notes from Liberia's report follow Priority 1 below.

Priority 1: Develop LFS

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		

Dissemination		
---------------	--	--

Government of Liberia has identified labor as a Poverty Reduction process priority – PRS process to last for next three years – need to monitor trend in labor – sought assistance from the ILO – Peter Digby visited Liberia twice – First, develop institutional framework – Ministry of Labor, ILO, and Statistical Office. Second visit, develop project document for labor force survey (currently in Liberia working and will depart Sunday). Census will provide sample frame for LFS.

National Statistics Office has been approached by MOL and other ministries regarding plan for LFS – no plan had been made – NSO reluctant to conduct LFS – ILO indicated that NSO should be responsible for LFS and not the MOL.

Issues – Look at salary and wage levels, extent of child labor (post conflict society), gender issues, employment rate, unemployment rate – unemployment politicized due to on-going problems related to post-conflict – CWIQ – conducted and places unemployment rate at 5.5% -- government does not agree with these figures and will not certify the results. LFS needed to produce estimates of unemployment

Working hours, size and nature of the informal sector – would like to collect from LFS

Will use SPSS and STATA -- training will be provided in both programs as part of on-going ILO project

HIES – IMF suggested that a sub-sample of the LFS survey can be used to conduct HIES

Final quarter of 2008 – will pre-test LFS questionnaire – LFS will take place sometime during first quarter 2009.

Revising existing establishment survey – NSB conducts establishment census – all establishments were listed – not yet released – MOL plans to use the census of est as a frame for sample – quarterly survey on wages and salaries – Est required to file quarterly report by law – only those in Monrovia – larger est have reported on quarterly basis, but smaller est have not reported – no enforcement of law requiring that est report each quarter

Suggestion from ILO – NSB plans to conduct annual est survey, the MOL could use data from Min of Finance to collect data on establishments reported to the Bureau of Tax – Tax records filed quarterly

Informal sector – No plan as yet to develop a stand-alone survey – plan to use the LFS to collect data on informal sector – no data produced in the past – try to include questions on LFS

Sudan – Surveys conducted by the NSB – what is role of MOL? To what extent do you participate in these activities? CWIQ – MOL reviewed the labor questions included – MOL understands scope of the problems and should be included in survey process – role of MOL needs clarification

Peter – How was listing of establishments conducted? NSB conducted establishment census – Every structure has been numbered and identified – quarterly establishment survey should be discontinued until results from establishment census are available.

Priority 2: Modify existing establishment survey

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Liberia (continued)

Priority 3: Informal sector survey

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Annex I.2.

**World Bank GDDS Phase2 Project
Workshop on Labor Survey Design and Informal Sector
Pretoria, South Africa
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COUNTRY REPORT: PROGRESS AND PLANS

MALAWI

Priority 1: Development of household labor force survey – Rachel Krantz-Kent

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	LFS cover both rural and urban areas – looked at concepts – employment, unemployment, and underemployment – stake holder meetings (3) overview of LFS – drafted proposal for LFS	Conduct another stake holder meeting -- inform those absent from initial 3 meetings, Finalize proposal for LFS including budget and work plan – funds mobilization (where will we get the money?)
Sampling Design	6 years plus – target population	Planned 2-stage cluster sample – frame will come from the 2008 census (beginning June 1 collection, results in Dec 2008) – Determine sample size following census
Questionnaire Design	Assisted with identification of questions to be included in survey	Develop questionnaire and pre-test instrument
Data Collection	None	Plan to collect data June-August 2009 – no data collection due to census – developing training manuals for enumerators
Data Processing	None	Questionnaires will be scanned
Tabulation of Data	None	CS Pro and SPSS – employment rate, unemployment rate, underemployment rate, by general labor force characteristics (age, sex, urban, rural, industry, occupation, type of employer,

		education)
Analysis	None	SPSS
Dissemination	None	Plan for November – December 2009

Priority 2: Development of Informal Sector Survey

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	Informal employment, informal sector activities, time use --	Adding as module to LFS – will use LFS design
Sampling Design	none	Use LFS sample
Questionnaire Design	none	Add as module to LFS
Data Collection	None	Planned for June – August 2009
Data Processing	None	Same as LFS
Tabulation of Data	None	Informal sector activities by sex, age, location, education, marital status
Analysis	None	SPSS
Dissemination	None	December 2009

Notes/questions:

Peter -- with time use will you not overload the survey – limiting number of core questions related to time-use – will you include a diary? It is planned. Do you intend to give access to unit records? Limited access to data will be provided – confidentiality – no identifying information will be revealed.

Sudan – why 6 years and above? Attempting to be consistent with the census in Malawi – capture child labor activities – child labor in agriculture – level of dissemination – 1) 15-64 and 2) child labor – 6-14 – youth employment 15-24

Uganda – What are the definitions being used – employment, unemployment? Why cluster sampling? Reference period June – August – how capture seasonal variations (esp agriculture) -- Definitions – unemployment (strict standard, ILO definition) – Ministry of Labor agrees to use ILO definition of unemployment – Cluster sampling – using 2-stage cluster sampling – stratification variable = district – within each district 2-stage sampling – Seasonal variations – conduct survey in 2 phases to capture farmers in Dec, Jan, and Mar – resource permitting will conduct survey in 2 phases – if not able to conduct a stand-alone survey will use integrate household survey to collect data throughout the year as a module – next HIS – household budget survey

Hussain – June to August 2009 – is there a reference period? What is the reference period? Reference period for LFS of 7 days for current activities – 12 month reference period for usual activities

Why informal activities by marital status – trying to capture activities by gender, would like to highlight activities by marital status – will help to see if married women are employed or stay at home to do work

Why was 1983 data not published or released? Don't know – just because

Moz – why marital status?

Malawi (continued)

Priority 3: Development of establishment survey and wages and salaries

Another section is responsible for this activity – technical assistance provided by Government of Norway – on-going project to collect data on wages and salaries from establishments in Malawi and update business register – funding and technical assistance from Norway – pending outcome

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design	Updated business register (updating entries in process)	
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Annex I.3.

**World Bank GDDS Phase2 Project
Workshop on Labor Survey Design and Informal Sector
Pretoria, South Africa
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COUNTRY REPORT: PROGRESS AND PLANS

MOZAMBIQUE

Note: The attendees from Mozambique did not attend the Launch Workshop in Kampala, Uganda, held in May 2007; nor did they work with the consultant (James Walker) who visited Mozambique during the first technical assistance mission held in November 2007. The current attendees have indicated that they will be responsible for the project from this point forward and will work with the consultant during the second technical assistance mission to be held later in 2008.

Priority 1: Review existing labor force survey – James Walker

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	Urban and rural areas – formal and informal sectors	
Sampling Design	No progress	Waiting for results from Census
Questionnaire Design	No progress	
Data Collection	No progress	Last LFS 2004/5
Data Processing		
Tabulation of Data		Unemployment, employment, underemployment – urban and rural
Analysis		SPSS
Dissemination		2010

Mozambique (continued)

Priority 2: Assist with processing and analysis of administrative data (see report)

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Mozambique (continued)

Priority 3: Review CWIQ Survey – not a focus of TA mission

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design		
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Notes and questions –

2004/5 results will be issued in English in July 2008

Liberia – what unemployment rate estimated from CWIQ? Waiting for new results from census – once these results are available will move forward on new LFS. 2007 census results will be used for new LFS -- National Statistical Bureau – works with CWIQ not MOL

When were 2004/5 results released? July 2005

MOL working with National Statistical Bureau – coordinating activities – MOL communicates needs – NSB collects, produces, and disseminates the data

Annex I.4.

**World Bank GDDS Phase2 Project
Workshop on Labor Survey Design and Informal Sector
Pretoria, South Africa
May 19-23, 2008**

COUNTRY REPORT: PROGRESS AND PLANS

SUDAN

Priority 1: Development of Informal Sector Survey – Peter Digby

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	Main variable = type of activity, source of capital, social insurance – urban capital of Khartoum	Plan to add as module to LFS 2009 -- 65% of labor force in informal sector (LFS 1996)
Sampling Design	None	Redesign LFS sample to account for informal sector
Questionnaire Design	None	
Data Collection	None	
Data Processing	CS Pro	CS Pro
Tabulation of Data	None	Activities – by labor force characteristics
Analysis	None	SPSS
Dissemination	None	Date TBD – plan to begin in July 2009 but will finalize

Sudan (continued)

Priority 2: Improvement of administrative records

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	Revised forms to include area, aliens working in Sudan, activities (type), nationality, occupation, qualification—consultant assisted with revision of form – should expand coverage to include all of Sudan (currently on in Khartoum) – states have not reported data	Collect information from all states within Sudan – standardize collection forms for administrative data – would like data monthly – states will report data and these data will be reviewed for completeness – ask states to provide missing data and standardize forms
Sampling Design	none	Individuals registering for labor in each state
Questionnaire Design	none	Revising form – standardize for all states
Data Collection	none	States will report monthly
Data Processing	Excel	CS Pro
Tabulation of Data	none	Sex, locality (area), type of skill, education, type of contract – concerning Sudanese working abroad (collective or individual contract)
Analysis	Excel	SPSS
Dissemination	None	Monthly, quarterly, annually

Sudan (continued)**Priority 3: Improvement of existing labor force survey**

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	All urban and rural – 10 years and above	
Sampling Design	Census	Use census to construct sample frame
Questionnaire Design	Add 6 questions as part of the census (on-going)	Developing questionnaire for LFS – how to design questionnaire to include informal sector activities
Data Collection	Census data have been collected	LFS in 2009
Data Processing	Scanning census data	CS Pro
Tabulation of Data		Employment, unemployment, underemployment, seasonal activity, by sex, age, occupation (main and secondary), education, marital status, migration status, economic activity, employment status, urban and rural
Analysis		SPSS
Dissemination		December 2009

Notes and questions:

Uganda – common data request for persons employed outside of the country, UBOS has difficulty collecting these data – where can we collect these data? Please provide more information on collecting data on those working abroad? Data is limited (legal and illegal) – collect data those who report officially -- all those who have a contract to work abroad should visit labor office to file form – no source to collect from those who illegally work abroad (visiting and stay to work).

Uganda – how do you define informal sector? Proposal has been made to provide consultant to develop questions that could be included in the LFS. Need assistance to develop questionnaire – establishments who employ 5 or more is classified as “formal” – informal = no fixed location, no registration

Peter – informal = only Khartoum why? Informal sector dominates in Khartoum – due to current situation in Sudan many migrate to Khartoum

Annex I.5.

**World Bank GDDS Phase2 Project
Workshop on Labor Survey Design and Informal Sector
Pretoria, South Africa
May 19-23, 2008**

COUNTRY REPORT: PROGRESS AND PLANS

SWAZILAND

Priority 1: Develop labor force survey – 2006 SADC Peter Digby, WB Edwin Robison

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	2006 with Peter Digby – misconception of who was included in labor force – May 2007 census – worked with census staff to develop definitions used -- guidance provided on concepts and definitions – concepts and definitions guide questionnaire design	
Sampling Design	Consultant reviewed design effect, nonresponse adjustment, weighting of survey results, how to best develop a sample for Swazi – divided country into 8 domains – 4 administrative regions by settlement type (urban and rural) = 8 – use PPS	Will use listing from census (recently completed) – pick-up housing units within each enumeration area -- consultant recommended PPES
Questionnaire Design	Adopted questions from Botswana and Tanzania – usual activity, current activity, informal sector, income – employment, unemployment – question on HH amenities that could be used a proxy for poverty measures	Completed for current LFS
Data Collection	Began in September 2007 – entire country – 3 months	Completed
Data Processing	Began in October 2007 to March 2008 – CS Pro	Cleaning and validating data

Tabulation of Data	Developed tabulation plan --	Run tables (still cleaning data) – assistance requested on tabulation of data – would like to finish by end of July 2008
Analysis	SPSS	Require TA
Dissemination		August or September 2008

Priority 2: Improve existing establishment survey

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	Annual survey – review of survey to date – All establishments (all activities) formal --	
Sampling Design		Update business registry that can be used to develop/update sample – sample needs to be reviewed
Questionnaire Design	2006 assistance through SADC to develop questionnaire	Do not understand questionnaire – bring SADC consultant back to explain/discuss questionnaire
Data Collection	High rate of non-response – conduct workshops/outreach to those est in sample to raise awareness – foreign establishments should be targeted	TBD
Data Processing	CS Pro	CS Pro
Tabulation of Data	Standard tables – employment by occupation, industry, skill level, citizenship, gender – special tables of interest on request	Problems with estimation
Analysis	SPSS	Will uses STATA
Dissemination	Hardcopy released annually, tables included in Dept of Labor annual report as well	Workshops to raise awareness among users

Swaziland (continued)

Priority 3: Develop a labor market information system

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	Discussed concept of LMIS	Consultant prepared detailed document for review and information – would like to develop LMIS as part of public service
Sampling Design		
Questionnaire Design		
Data Collection		
Data Processing		
Tabulation of Data		
Analysis		
Dissemination		

Notes/questions –

Uganda – establishment surveys are not capturing labor information – primarily capture labor cost data – how is Swaziland capturing occupation data in the est labor survey?
 Questionnaire developed that includes all categories – employees by occupation, type of establishment, earnings—Swaziland will share questionnaire with Uganda

Annex I.6.

**World Bank GDDS Phase2 Project
Workshop on Labor Survey Design and Informal Sector
Pretoria, South Africa
May 19-23, 2008**

COUNTRY REPORT: PROGRESS AND PLANS

UGANDA

Priority 1: Develop stand-alone labor force survey – Ed Robison

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	Unemployment, underemployment, employment, skills mismatch – urban unemployment focus	Expand coverage to urban and rural (resources allowing) – biannual survey (resource limited) – target annually
Sampling Design	Reviewed sample design, discussed different methods, cost in relation to precision, cluster sampling also discussed	Selection of enumeration areas (EA), review sample size (costs/resources)
Questionnaire Design	Developed draft questionnaire	June?? Pre-test finalize questionnaire
Data Collection	Not yet done	October – November data collection, soliciting funds from ILO (child labor) – piggy back labor with child labor with ILO funding (limited resources)
Data Processing	Not yet done	Will use CS Pro, design
Tabulation of Data	Not yet done	Unemployment, underemployment, employment, skills mismatch
Analysis	Not yet done	Plan STATA, plan to release March 2009
Dissemination	Not yet done	March 2009

Note: Following workshop stakeholders picked up labor – labor made a priority at UBOS and with donor agencies (DFID) -- Developing/finalizing plan to present to management – More willingness to support information about labor – increased support from UBOS

Question (Liberia) – do you have a national bureau of statistics – Yes, UBOS – Uganda Bureau of Statistics – UBOS produces statistics on labor – Ministry of Labor uses the data to develop policies – work closely with the MOL – UBOS produces and analyzes labor statistics -- Ronald – International standards – stat agency collect/analyze data – MOL uses data for policy making purposes – avoid conflict of interest

(Swaziland) – non-response – how high? What did you do? – observations less than 30 not valid – problem with large establishment – do not want to release information – especially those who have large numbers of foreigners on staff – non-response approx 48%

(Sudan) – what do you mean by stand-alone LFS? Why did you choose a cut-off of 15 or larger employees for the est sample? Used business register, those who employed 15 or more = 95% of all establishments, therefore determined to be representative – below 15 the number of employees was very, very small (1 or 2) – stand-alone – survey targeting labor alone, not a module attached to other surveys – sample design different when using a module – i.e. depending upon survey the sample design varies – LFS targets hh and uses filter questions – as a module the filter questions are related to the main survey not the module

(Stats SA) High non-response, any alternative sources? National Security Funds records may be used, but needs to be assessed – 5 employees and above must register with NSF in Uganda, but many avoid registration – Problem with collecting data by occupation – est don't want to provide detailed data by occupation (pay, etc)

Hussein -- Did you use frame information to make adjustments for non-response? Lack the capacity to make adjustments for non-response, attempted to make adjustments for non-response – would like to develop for non-response – Register updated and current (2007) – can use the register to adjust for non-response

Ronald – economic census – registered units 160,000 – 10,000 establishments = formal and 150,000 = informal – total number of workers = 450,000 (approx) in formal establishment total workforce = 10 million only a fraction of the labor force is linked to registered firms – 73% subsistence agriculture, commercial activities (vendors, etc, exclude agriculture) 15% of total workforce is engaged in wage employment, 5% engaged in public sector – subsistence very important in less developed economies, SA more developed less subsistence – economic activities in urban area unemployment 13-20% -- concerned with labor force in urban areas – why such high rate of unemployment? Is it an issue of education? Why youth unemployment so high? Initial concern with urban unemployment – rural areas much lower rate of unemployment (2% approx)

Uganda (continued)

Priority 2: Compute labor cost index using wage/salary data collected from establishments

Survey Steps	Work Completed to Date	Tasks to be Completed
Survey Design	Review methods	
Sampling Design	1,200 + establishment	
Questionnaire Design	Draft questionnaire	
Data Collection	Collected data from 654 establishments – non-response – sample of 1,200+ establishments – problems especially in Kampala – 15 persons and above (est) – ref March 2007	Collect data for March 2008 – consider major sectors – manufacturing, education, health, construction, agriculture (large scale), hotels, TBD
Data Processing	Completed using CS Pro	Problem – data validation and quality issues (errors discovered)
Tabulation of Data	Employment by occupation, (m/f, how paid, overtime) – vacancies – occ. illness and injuries – training (how many est complete training – zero)	
Analysis	STATA	Major area of concern – analyzing data (greatest need) – need for review of analysis methods
Dissemination	Not completed	Goal to disseminate May 2008 – not yet disseminated – probs with computers – goal to release by end of June 2008

Annex J:

**World Bank GDDS Phase2 Project
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Pretoria, South Africa
May 19-23, 2008**

Exercise #1: Survey Design

Each country should develop the following using Excel:

- Draft survey design in **X** number of steps
 - Total number of steps may vary by group
 - Detail each step
 - Clearly identify the institutions and/or persons involved at each step
- List any problems and/or questions encountered

Exercise #2: Sampling Approaches

Each country should prepare the following:

- Draft sampling approach for survey
 - Identify sample unit
 - Identify sample frame
 - Validate the source data
 - Select one (1) or more methods for sampling
 - Describe the method or methods
 - Why have you selected these methods?
 - List problems and/or questions that need to be resolved or addressed

Exercise #3: Questionnaire Content and Design

Each country should prepare the following:

- Develop list of topics and/or indicators to be observed
 - Describe and define the topics and/or indicators
- Draft scheme or flow chart of these topics
- Using the scheme or flow chart, formulate questions for the questionnaire
- List all possible responses for each question
- List any problems and/or questions that need to be resolved or addressed

Exercise #4: Data Collection

Each country should prepare the following:

- Develop and draft data collection strategy in approximately 10 steps
 - Total number of steps may vary by country
 - Describe what is needed (resources, etc) at each step
 - Describe how each need identified will or could be met/fulfilled
- List any problems and/or questions that need to be resolved or addressed

Exercise #5: Data Processing

Each country should prepare the following:

- Define the data processing strategy in approximately 10 steps
 - Remember to include treatment of missing data, validation of data, etc.
- List any problems and/or questions that need to be resolved or addressed

Exercise #6: Tabulation of Data

Each country should prepare the following:

- Draft tabulation scheme that is needed
 - Minimum of 10 tables should be identified
- List any problems and/or questions that need to be resolved or addressed

Exercise #7: Data Analysis

Each country should prepare the following:

- List and describe the analytical uses of the data
 - For what purpose will the data be used?
 - What analysis is relevant to meet user needs?
- Describe how data can be linked
 - Why would data be linked?
- List any problems and/or questions that need to be resolved or addressed

Exercise #8: Dissemination of Data

Each country should prepare the following:

- Draft dissemination strategy
 - Clearly identify and describe each step in the dissemination process
 - Identify all organizations and/or persons involved
- List any problems and/or questions that need to be resolved

Annex J1:

**Work Session and Discussion
Survey Design and Sample Design**

Country Reports and Feedback

Liberia

Survey Design – LFS

1. Identify who to measure – employment (formal and informal), unemployment (formal/informal), child labor (formal/informal), hours worked (formal/informal), education attainment, and gender issues
2. Who is being measured -- non-institution pop (ex military)
3. Frequency – 5 years (financial constraints)
4. National coverage – 5 regions
5. How to measure – Probability sample of HH units

Dissemination – 6 months after survey

Goal – produce labor market information every five years at national/regional levels

Training of data collection – two weeks

Training of supervisors and enumerators – 2 weeks

National Statistical Bureau will collect

MOL and ILO will provide technical assistance

Problems -- limited skills in analysis and report writing

Difficulty of accessibility (esp. rural)

Sample Design –

1. Identify sample unit – housing unit w/unique ID number from census

2. Census data will be used to construct the sample frame – currently not available
3. Census as source data and will be available in July 2008
4. Most up to date data available = census
5. Probability sample
6. Assess reliability of estimates (with use of prob sample methods)
7. Country divided into 5 regions, EA selected from each county (probability methods), select HH from each sampled EA (systematic selection methods) (limit travel costs)
8. Est. 6,000 – 8,000 units based on constraints
9. Problem – lack of training

Current census completed March 2008

Comments/questions:

Frequency – 5 years not sufficient – better to conduct annually or at the very least bi-annually – Do you have any other surveys that could be used as a vehicle to collect labor market data? NSB will conduct annual establishment survey – est census completed in 2008 – annual establishment survey will be conducted annually.

Golden rule for sample size – how detailed will the data be? Producing national estimates – sample can be smaller – national/subnational – larger sample required – next question – how to optimize available sample – need to identify domains of estimations (geographic) – what CVs are needed – what those are identified – determining sample size becomes mechanical – balance between optimal sample size and resources – determine needs and then identify most cost effective means of satisfying those needs

For each geographical areas – approximately 600-700 per area (rough estimate)

Uganda

Survey design – LFS

Measure – employment, unemployment, time related underemployment, occupation, time use, informal and formal employment

All person 5 years and above who are currently working and available for work (child labor)

Reference period – current activity 7 days, usual activities last month

Coverage – whole country – rural and urban, regions (5)

Frequency – 3 years

How – visit HH and interview HH members

Goal – general LM indicators

Institutional framework – Min. of Gender, National Planning Authority, Min of Finance

Sample design –

2-stage stratified sample design – regions = strata and the EA primary sampling unit – HH final stage sampling unit – will use sample frame census 2002 (most recent)

Sample has been cleaned to remove institutional population, refugee camps – Census includes all people – remove institutional population for LFS

Validate – HH listing following selection of enumeration areas and systematically select the number of HH within each EA

Produce satellite imagery to validate

Selecting EAs – PPS methods

5 regions, rural and urban

Problems – adjusting for non-response, demands by districts (difficult to meet needs of districts because data at region level not district level)

Comments/questions:

Sampling strategy when resources are limited – if sample is limited – how to maximize the sample – The region as a stratum is not efficient – rural more homogeneous than urban therefore sample smaller in rural areas and more in urban areas – Deeper stratification than region – can produce estimates by region and then rural / urban within each regions – Difficult areas due to travel costs – smaller units included (more costly, more homogeneous) Neyman Allocation principle – sample is proportional to the inverse of the cost considering number of units and variation in the area –

Reasonable estimates can be produced with minimal resources

Uganda – problem cost -- Urban areas near Kampala that are not part of greater Kampala –

Neyman allocation – for national aggregation

HH = sampling unit – how are you defining HH – will you follow HH –

Structures are listed and HH are identified within each unit – HH = normally eat and eat together

If HH is listed – what if people move – do you follow the HH?? No, don't follow HH – list is updated continuously

Malawi

What – employment, unemployment, under employment, informal employment

Concepts/definitions – consult stakeholders (MOL, Econ planning and Development, Min of Finance, Trade, and education) also consult with international orgs, policy makers and data users

Goal of survey 0—Produce LMI information every 5 years and national regional and district levels –

Specifically to estimate the size of the labor force – interview individuals from 6 years and above whether they are employed or not using a questionnaire – identify informal employment using filter questions to be developed – collect data on gender issues by collecting data on demographic data on sex, education, age

Who is being measured – individuals 6 years and above, whole contry urban and rural

Fequency – every 5 years beginning in 2009

Sample approach –

Sample unit – HH

Frame – Census EA 2008

Very current

Methods – PPS methods

Stratification selection of PSU's from sampling frame, listing HH within selected PSUs, selecting HH using systematic sampling

Comments/questions:

Reconsider 5 year interval – too long – how many districts do you have – 28 and will produce data for each district – will result in 18-20,000 HH -- 5 year interval – resources expended by developing an infrastructure – using infrastructure more frequently not expensive.

Apart from the LFS – are there more frequent HH surveys? Yes, HIS – will add module on labor issues to other surveys – welfare monitoring survey – module can provide estimates annually – more detailed can be completed less frequently

Sudan

LFS

Stakeholders – MOL, Bureau of Statistics, Min of Finance, Min of Higher Education

What – need to measure employment, unemployment, underemployment, education, age, sex, economic activities, employment status, migration status – all formal and informal

Who is being measured – population 10 years or more

Frequency – problem of finance – once every 3 years

Reference – 7 days for current activity, 1 month for usual activity

Coverage – each sampled dwelling unit and all persons in DU – 25 states

Questionnaire to collect data

Many problems – all concerning survey design

Sampling design –

Dwelling is unit for sampling

Current census frame classified by state, locality, administrative area, EA, dwellings, HH

4,000 HH approx

Create master sample – 1, 000 enumerated areas

Proportional methods, systematic selection

Problems – experience in sampling, data processing, and analysis

Reactions – in your sample of dwellings, will you sample all HH within the dwelling unit? All HH within the dwelling – concentration = dwelling

How old is census? April 2008

Design – average of 4,000 dwellings per year – unit cost will be high with only 4 HH within each enumerated area -- 25 states would need 1,000 per state (approx) – sample size = 20,000 and 25,000 HH national sample – more than 2, 000 per year – take 8-10 dwellings

How do estimate the enumeration cost – will discuss later this week

Swaziland

LFS

What measure – employment, unemployment, underemployment, inactivity, and informal employment

All person who are 5 years and older (child labor) who are able to furnish labor in the production of goods during a specified reference period of 7 days

Began last year to conduct LFS, planning to conduct annually

All 4 administrative regions according to settlement type and other social clusters

Data will measure through HH based survey

Goal – produce annual report on labor statistics

Challenges/problems – limited data analysis and report writing skills

Sample design –

Sampling frames – 2007 Census

2,074 EAs

Master sample – 357 EAs

Two-stage stratified design – stratification and sample allocation geographic settlement types and census attributes (social economic) income education and etc.

Sample allocation by region –

Sample weighting and estimation use

base weights

adjusted base weights

nonresponse adjustment

PSU level non response adjustment

nonresponse base weights

replicate weights

precision of the estimates

Problems/challenges – sample rotation, weight calculation, lack of sampling skills, technical expertise on estimation

Master sample – what criteria was used? Is it representative of total population? Sample and weighting – what have you completed?

357 EAs is representative – enumeration areas selected – enumerate 10 HH within each EA

Sample and weighting – already completed weights from master sample frame – estimation, non response can be calculated using other statistical tools

Total sample size = 3,570 HH

Comments/questions:

Is rotation necessary when sample is once per year or twice per year? Depends on estimation of change – year over year requires some overlap – consider response burden and estimation needs – imprecise estimates of change year on year with two different samples

General comment – with consultant try to enhance capacity building – need guidance so that you do the work and not the consultant

Mozambique

Survey design

Measure the informal sector in terms of numbers and hours of work

Non-institutional population

Frequency – 3 years – completed survey in 2005

Where – cover all parts of country – provinces (11) and districts (128)

Sample of HH to measure

Design informal sector questionnaire

Goal – political and economic needs and to understand small and medium enterprises and to understand the contribution of informal sector to economy

Sample design –

Sample unit – dwelling unit

Sample frame – 2007 Census

Select sample of EA, listing, choose sample of dwellings

Validation of source – recent census (2007)

Sampling frame based on list of dwellings from 2007 national population census

Problems – roads are in poor condition

General comments/observations (all presentations) –

How can you reinforce sample capabilities – resources should be pulled together at country level – 1-2 persons should be trained to deal with sampling issues – Stats SA – documentation provided during workshop will provide reference

Will talk about next mission – next mission should include 1 or 2 days of rapid training using materials from Stats SA

Surprised to introduce 3 concepts – informal sector (units), informal labor (persons), non-market activities (subsistence)

Informal sector focus only on units not persons

Build network and try to transfer knowledge so skills are retained for current project and beyond – network across countries, within country, international orgs

Things need to be learned with regards to sampling

Need to understand why we employ certain techniques – know what we are doing

Sample unit = HH can be problematic– need to understand what we are doing

Sampling requires extensive knowledge – take advantage of expertise – prepare before missions

And involve as many people as possible

Consultants – develop your skills by working closely with consultants at each step – transfer of skills

How long has Hussain worked in SA and how long will he stay?

Collect paper documentation from consultant – complete list of steps of what was done

Annex J2:

**Work Session and Discussion
Questionnaire Design
Country Reports and Feedback**

Malawi

Exercise – excellent – insight into how to design questionnaire

Household box

- Resident status (usual HH members)
- Age (month, year)
- Sex
- Marital status
- Highest level of education attained
- Highest level of qualification attained
- Tribe
- Nationality

Employment

- Formal employment
 - Employees
 - Employers
 - Self-employed
 - Unpaid family workers
- Informal employment -- ??? Written contract???
 - Own-account workers
 - Employers
 - Employees
 - Unpaid family workers

Production units

- Formal units
- Informal units
- Business registration of business
- # of workers

Non-market activities

- What

Hours worked

Unemployment

Under employed

Not active

Swaziland

Exercise – good yeah helping us to how one can develop questionnaires

Cover page

- Enumeration area
- Region
- Constituency
- Settlement type
- HH number

Household box/demographic section

- Name
- Surname
- Age
- Sex
- Marital status
- Length of stay
- Previous residence
- Reason for migration
- Highest level of education attained
- Subject of training
- Year of completion

Activities

- Last 7 days – current
- Last 12 months – usual

Employment

- Current
- Usual
- Informal employment
- Formal employment
- Employees
- Employers
- Job type ?? -- occupation
- Hours worked
- ?? Sector

Unemployment

- Attributes
- Searching for work

Under employment

- Hours of work

Business type

- Industry

??? No second job

??? No non-market activities

Sudan

Exercise – very beneficial for us – conducting this exercise reflects to what extent we have benefited from the experience of Stats SA and adjusting their work to our situation

Not finished, but get more

Demographic characteristics of HH

- Define HH – unit that consists of those members who eat from one pot
- Respondent – aim for interview of head of household
- Sex
- Age
- Nationality
- Marital status
- Migration status
- Education

Employed

- Define employed = those who work for one (1) hour during the last week, working with salary or for profit,
- 10 years and above
- Employment status
- Activity – which sector
- Occupation (main and secondary)
- Sector of work (government, public, and private, and cooperatives)
- Place of work – fixed or mobile
- # of workers in place of work
- Hours of work
- Nature of work (seasonal, casual, permanent)
- Salary payment (daily, weekly, monthly) ??? hourly or daily rates
 - Cash or in-kind

Unemployed

- Define unemployed = those available and actively seeking work
- Those who work before
 - Sector

- Occupation
- Economic activity
- Reason for leaving work
- Duration of unemployment
- Those unemployed for first time
 - Do you ever look for work
 - How do you look for work – ways of searching for work (labor office, relatives, MOL, etc)
 - Do you work for family business
 - ??? level of education – asked in HH box

Inactive

- Reason for not working (housewives, students, disabled, profit receiver, inheritance)
- Ever work pay or unpaid HH business

Income of HH

- Income for different sources – major job, agriculture, livestock, doing any family activity for profit
- Use for poverty level estimation

?? Non-market activities

Mozambique

Exercise – think good exercise – same as prior comment

HH box

- # of persons living in same dwelling eating from the same pot – who paid the bills
- Age
- Sex
- Marital status
- Head of household
- ??? education

Formal employment

- Written contract
- Income tax
- Retirement fund
- Number of employees
- Place of work

Informal employment

- No written contract
- No income tax
- No retirement fund

- # of workers
- Place of work
- Type of work

Unemployment

- Active
 - Trying to start business – looking for job
 - Time without job
 - Age
 - Available for work now
- Inactive
 - Health reason
 - Age
 - Education

Non-market activities

- Level of production --??? output
- Time of working -- ??
- Hours of work
- Own household
- Provided to other HH

Underemployment

- Didn't define

Secondary jobs

- More than one job

Child labor

- Age – 6 years – 14 years

Disability

- Specific job (link to type of job)

Seasonal jobs

- Only when raw materials are available

??? employment – criteria = written contract or lack of written contract

??? confusion between sector and employment

??? how measure level of production

Uganda

Exercise – it was good were able to share ideas and learn from SA experience – can develop questionnaire with experience

Characteristics of HH

- Members of HH
- Name of head of household
- Persons
- Sex
- Age
- Education attainment

Population – above 14 years of age

Employed

- Occupation
- Industry
- Mode of employment (formal, informal)
- Hours of work during last 7 days
- SA definition of informal employment is okay – we can adopt – written contract

Not employed

- Inactive
 - Fetching water, looking after babies
 - What activities
- Unemployed
 - Actively looking for work
 - Ever been in employed or not
 - Type of employment (if yes)
- Non market activities
 - Question 2.6 from SA – good enough
 - Types of activities

Total population – HH – Employed – Formal/Informal – Production unit

Liberia

Exercise – Good – the work of SA is instructive for those of us still developing an LFS – demonstrates the future/path to follow

Secondary employment is not very important to us now

Cover Page

- County code
- Area
- Housing unit number
- Total number of occupants

Demographic

- Age
- Sex
- Marital status
- Educational level
- Occupation -- ??? misplaced – to employment
- Ethnicity
- Size of HH
- Disability
- Agree on most of questions on Stats SA QLFS – not race – ethnicity is more important to us

Formal employment

- Formal contract for work
- Own business – registered
- Paid work/job
- Hours of work
- ??? occupation

Unemployment

- Not working
- Available for work
- Looking for work

Informal employment

- Entity not registered
- No written contract
- No benefit payment
- Place of work

Formal and informal production units

- Type of job
- Tax
- Name of place of work
- Informal production
 - Own account
 - Contributing family member worker

Non-market activities

- Production for own use
- Production provided to other HH

Annex J3:

**Work Session and Discussion
Data Collection Strategy
Country Reports and Feedback**

Malawi

Preparation of PSUs – sample size
Time frame
Budget
Preparation of field maps for PSUs
Publicity in selected PSUs
Recruitment of field staff
Hiring of vehicles
Training of field staff
Purchasing of stationary and equipment
Printing of field materials – forms, questionnaires
Deployment of field staff teams
Listing of dwellings in selected PSU
Sampling of HH using systematic sampling
Interview of HH – enumerator assigned HH
Supervisors for quality control
Collection of completed questionnaires

Needs:

Survey sampling experts
Stationery – maps, questionnaires, forms
Radio, tv, newspaper, posters, official letters, leaflets, brochures, interview IDs
Temporary staff
Vehicles
Fuel
Hiring charges
IT equipment
Training venues
Allowances

Meeting needs:

Money – budget – government and donors

Problems:

How to identify funding sources
Identification of quality enumerators
Timeframe of conducting survey

Questions/comments: training materials, TOT, evaluation exercises, reporting on results
– phases – preparation, planning, budget, etc

Liberia

Data collection procedures

Select EAs

County level

District

Listing of all structures

Publicity – print and electronic media

Meeting with community and tribal leaders

Obtain permit from Min of Internal Affairs

Training

Consultants

Recruitment of temporary field staff

Development of manual for training – field staff, supervisors

Conduct training

Evaluate progress – select enumerators, supervisors and coordinators

Enumeration

Face-to-face interview

Logistics – vehicles, communication equipment, supplies, printers, computers, STATA,

SPSS packages, generators, torch lights

Printing of questionnaire and training materials

Resources –

Budget estimate

Government commitment and support

Donor contribution

Problems

Bad roads

Commitment from donors not forthcoming

Enumerators don't understand local language

Questions/comments: STATA, SPSS – data processing – generators – data processing

Swaziland

Timeframe

3 months

Budget

Government/donor community

Structure

Survey manager, coordinators, field workers

Distribution of EAs
Publicity
 National and community level
Recruitment of staff
Training
 TOT, training of field staff
Deployment of field staff
Logistics
 Equipment
 Vehicles
 Printed questionnaires
 Stat/supplies
 Communication tools
 Listing forms
 Maps

Problems –
 Budget, quality of materials, publicity

Sudan

Timeframe
 Last census for PSU
Budget
Recruitment of staff
Recruitment of coordinators for each state
Hire temporary field workers
Printing of materials – questionnaire, etc
Training of supervisors and coordinators
Training of interviewers
Hire expert for sampling
Staff to edit data

Problems
 Finance
 Lack of experience in sampling and processing

Mozambique

Time frame
Stakeholders meeting
EAs
Publicity
 Speak with local leaders
 Media
 Stakeholders

Training

- Recruitment of trainers
- Recruitment of enumerators
- Develop/conduct training

Data collection

- Vehicles
- Supervisors
- Questionnaire
- Communication equipment

Problems

- Communication with stakeholders – MOF, MOL, local leaders, Min of Internal

Administration

- Roads – poor condition
- Seasonality – weather issues

Uganda

Planning / resource requirements

- Number of interviewers required
- Fuel/vehicles
- # of questionnaires
- Training materials
- Schedule of work
- # of guides required

Recruitment strategy

- # of interviews required by local language
- Level of education – senior 4 or more
- Age – 25 to 45 yo

Training

- Central training
- Field practice
- Mock interviews
- Test / evaluation
- Train more than required
- Select interviewers according to performance

Publicity

- Brief lists/interviewers
- Letters of introduction
- List of enumeration areas
- Guides
- Media discussion

Data collection

- Teams (supervisors, interviewers)
- PSU should be covered as a team
- HH should be visited at least 3x before non-response
- Checklist
- Questionnaires
- List of sample HH
- EA maps
- Assignments sheet

Monitoring

- Senior supervisors
- Debrief
- Supervisor spot-checks
- Field reports

Problems

- Dropping out of enumerators – pay issues
- Political opposition
- Terrain

Stats SA feedback:

- Planning
- Implementation
- Monitoring

- Budget at each level
- Timeframe at each level

- Activities linked with timing
- Publicity strategy – outlined

- All strategies outlined during each phase
- Clear recruitment strategy

- Outline closure – all requirements to provide closure and accountability

Annex J4:

**Work Session and Discussion
Data Tabulation and Data Analysis**

Country Reports and Feedback

Liberia

Tabulation

Labor characteristics by sex
Labor force characteristics by sex and county
Employment by industry
Employment by sector and industry
Employment by sex and occupation
Employment by sex and status
Employment by sex and hours of work
Employment by sex and nature of work (type)
Characteristics of unemployed
Involvement in non-market activities

Analysis

Data describes characteristics of labor force
Total population of LF at given time
Gender issues – percent F vs M
Age groupings of LF
Employment – involved in market-related activities
Informal employment - %
Identify those who are underemployed
Non-market – agric non-market activities
Agric – market-related activities
Those engaged in HH activities
Unemployment – reasons
Identify characteristics of unemployed

Users – decision makers interested in unemployment, youth unemployment (girls especially), old age population (social security), growth of agric sector, share of market related activities, skill required

Researchers – all categories

Data linked – verify changes during a given period

Problems – Analysis

Swaziland

Labor force characteristics by administrative regions

LF by settlement type

Employment by sex and hours of work

Employment by sector and industry

Employment by industry and sex

Employment by sex and status

Employment by sex and population

Characteristics by ecological regions (highlands, lowlands, mountains, etc)

LF characteristics by age groups

Characteristics by gender

Analysis

Assess the nature of unemployment and underemployment

Assess trends of employment on the basis of different populations

Assess child labor issues

Assess Swazi population employed outside of Swaziland

Employment discrimination

Gender, disabled and vulnerable groups

Decent work

Formal versus informal employment

and characteristics of the unemployed

Income from employment

Characteristics of labor migrants

Youth unemployment

Characteristics of students graduating from vo tech institutions

Problems – Analyzing data

Mozambique

Tabulation

LF by sex

LF by region

Employment by structure of economy

LF by age

LF by residence area

Employment by industry

Employed, unemployed and inactive (by age, by sex, by region)

Problems – no problems – assistance with analyzing data

Analysis

Policy makers for planning purposes

Non-government users – international organizations and other

Poverty reduction

Investors and donor community – target needs

Gender analysis

Regional analysis

Problems – too many to list

Uganda

Tabulation

Population characteristic

Migration

Age

HH size

Region

Residence

LF characteristics (by sex, residence, age, educational attainment)

Labor participation rate

Employment/population ratio

Unemployment

LF growth rate

Employed persons

Formal / informal (with out agric) employment (sex, residence, age)

Agric

Status (sex, age, residence)

Self-employed

Employees

Unpaid family workers

Occupation (sex, age, residence)

Major classifications

Sector of employment (sex, age, residence)

Major divisions

Earnings (sex, age, residence)

Mode of payment

Income groups

Underemployment

Occupation

Industry

- Hours of work
- Education levels
- Non-market activities
 - Hours of work
 - Type of work
 - Sex
- Unemployed / discouraged workers
 - Sex
 - Level of education
 - Residence
- Inactive
 - Inactivity rate (sex, age, residence, region)
 - Reasons for inactivity

Analysis

- Discuss with stakeholders
 - Ministry of Education – skills match, skills demand
 - Ministry of Labor – jobs by sector (policy), unemployment (sex and age), youth unemployment, formal vs informal
 - National Planning Authority – all indicators
 - Development partners – support government activities
 - Ministry of Finance – development framework and poverty eradication action plan
 - Researchers – all indicators
 - Employee organizations – income data

Linking of data – Uganda National HH Survey – data collected on poverty – link with LF data

Problems – Unemployment very political, determining relevance to users needs

Malawi

Tabulation

- Population by sex, age
- Total LF by sex, age, residence
- Participation rate by sex, age, residence, education
- Employment and employment rate
- Employment by occupation, sex, and age
- Employment by industry, sex, age, and residence
- Employment status by sex, age, and residence
- Employment by sex and nature of employment
- Employment by hours worked during last week by sex, age, residence
- Unemployed by sex, age, residence
- Unemployed by sex and education attainment

Unemployed persons actively seeking work by sex and education
Unemployed not actively seeking work by reason by sex
Non-market activities by sex, age, residence

Analysis

LMI used by stakeholders – MOL, MOF, M of Planning, Trade Unions, Reserve Bank, research institutions, non-gov orgs, donor community, religious groups, general public

Indicators include employed in market production (key) and non-market production activities, time-related underemployment, unemployed, not economically active, unemployment rate, absorption rate, and participation rate

Policy formulation and monitoring – Malawi Growth and Development Strategy and MDGs

Done at national, regional, and district levels to meet users needs

Use other sources of information

Problems – data estimation procedures and analysis

Sudan

Tabulation

Sample from census frame – dwellings, HH, national and state level
Response rate by state
Consistency check – census results
CS Pro

Tables

Total LF national, state, rural, urban
Employment, unemployment, participation rate, inactive, domestic workers, place of work, hours of work, nature of work, in migration by state, out migration by country, return migrant by country of origin, total HH income from all sources, informal employment by type of activity, and source of capital
Non-market activities by hours worked
Status by sex

Problems – lack of experience

Analysis

Data needed to be integrated in macroeconomic model
National Comprehensive Strategy
Poverty reduction

Employment policy
Users, researchers, government (all ministries)

LF by sex, age, education, industry
Employment by sex, age, education, occupation
Unemployment by sex, age, education, duration
Inactive reasons
Domestics by type of work
HH income from all sources

Problems – Lack of experience

Comments

Overall, good plans – describe employed, unemployed and economically inactive population – good attempt to incorporate user needs – few discussion on trends – important to look at trends and changes – Uganda style to populate tables (CVs) Do the figures make sense? Reliable? Identify more indicators to target variety of audiences/users

No discussion of current vs usual activity
Problems with data analysis – what is the main issue? What is distinction between residence and region? HH income? Income collection may increase burden on respondent. Limit to what can be cross-tabulated.

General observations – study the tabulation program of Stats SA – emulate what works – Stats SA = good, therefore copy

Five approaches –
 Analysis of formal and informal units
 Formal and informal employment
 Formal and informal employment by hours worked
 Non-market activities by defined type and hours worked – also, type of output...can it be quantified? Need to look at how important non-market activities is to the individual country – can LFS measure output...could add questions.
 Second job – formal versus informal and hours worked.

Analysis – how to assess skills? Objective measure = education – trying to assess skills beyond education level can be problematic if not impossible – analyzing skills can be weak – education good proxy for skills level

Overall conclusion – focus on work completed by Stats SA – tabulation and questionnaire – how can these be adopted. Take advantage of their experience and work completed to date.

Annex J5:

**Work Session and Discussion
Dissemination Strategy**

Country Reports and Feedback

Sudan

Seminars (all stakeholders)
Hard copies (academic)
Software – CDs
Website – officials and students
Micro-data research (experts)

Problems

Limited resources
Special requests for users

Malawi

Identify data users and stakeholders
Communication via press release, radio, TV, newspaper
Workshops to disseminate data for users
Hardcopy, CDs, website

Problems

Quality of products

Uganda

Dissemination – identify stakeholders
Dissemination via media (radio, TV, newspaper)
National workshop – researchers, government ministries, etc
Dissemination for technical groups – hard copies
Develop information management system – identify variables and obtain data – students, etc

Problems

Funds – aren't able to disseminate at district level only national level

Mozambique

Radio
Newspaper
Website

Persons involved – government institutions, investors, parliament, ILO

Problems

Communication system – needs improvement – Census 2007 not published as of yet

Swaziland

Press release – annually

Identify all stakeholders – government researchers, labor unions, policy makers, etc.

4-5 weeks after collection = dissemination

Methods – hard copy, CDs, electronic media, website

Confidentiality – data are confidential

Engage information officer to release data

Problems

Funds

Website

Reaching users of different levels of understanding

Liberia

Hardcopy

Excerpts for website

Excerpts on radio, newspaper

Press conference to explain report

Distribute to various users

Look at policymakers, researchers, donor agencies, public and private libraries, academic institutions, copies for those who would not have access to traditional distribution

MOL provides answers on demand

Comments

Training of users

My remarks

List relevant stakeholder (inside and outside users)

Purpose of use – policy-making, monitoring developments

Kind of use – knowledge, analysis

Tools available

Release calendar – announce in advance

Confidentiality

Independence

Metadata – description of methods

Annex K:

Participant Evaluation

Labor Market Statistics Module
DFID project GDDS 2
Pretoria, South Africa, May 19-23, 2008

Please take a moment to complete these questions. Your answers will be used to assess the usefulness of the workshop and will guide future work on the project.

Thank you very much!

I attended the workshop as
(Please check one)

- As manager or supervisor ()
As a compiler ()
As an observer ()

Please write a rating number in the space provided at the end of each statement

- 1 = I totally disagree (most negative)**
2 = I mostly disagree
3 = I am neutral
4 = I mostly agree
5 = I strongly agree (most positive)

na = Not applicable to me

Section A: My views on the workshop in general

1. Overall, **attending the workshop** was useful for me ()
2. It was of interest to listen to the **presentations** by the staff of Stats SA ()
3. The **discussions with colleagues** from other countries were useful ()
4. Discussing the **experiences** of Stats SA was helpful ()
5. We had **sufficient time** to discuss the important issues ()

- 6. The workshop was **well organized** ()
- 7. The conference **facilities** were good ()

Section B: My views on the module to date

- 8. Overall, the **module has been valuable** for my country ()
- 9. Future **steps to be taken** were clearly explained ()
- 10. The **modular approach** is a good way to get things done ()
- 11. This module continues to **fit our needs** ()
- 12. It is important that we agreed on **results** ()
- 13. The agreed **workplan** continues to be realistic ()
- 14. The completed **expert visits** have been useful ()
- 15. The planned **expert visits** will be useful ()
- 15. I hope that I can participate in the **closing workshop** ()
- 16. I hope that **I can contribute** to the success of this work ()

Section C: My write-in comments:

Annex L:

General Data Dissemination System, (GDDS phase 2)

Socio-Demographic Statistics Project for Anglophone Africa: Provision of technical assistance as the expert for:

Topic: Labor Statistics

**Workshop on design of labor surveys and informal sector
Pretoria, South Africa**

Dates: May 19-23, 2008

Background

With financial support from the Department for International Development (DFID) of the United Kingdom, the World Bank is implementing a project to assist 21 Anglophone Africa countries to participate in the General Data Dissemination System (GDDS). Participating countries are being assisted to participate in the GDDS through two separate, but linked projects both financed by DFID. The IMF is providing project management and technical support in the area of economic and financial statistics. The World Bank is providing technical support in the area of socio-demographic statistics. Both projects run concurrently until February 2010.

Technical Assistance

Technical assistance is being provided through the World Bank to help countries implement plans for improvements in population, health, agriculture, labor market, justice and security, management of statistical systems, GIS and small area statistics. The GDDS framework developed by the IMF provides the framework for the detailed elaboration of long-term statistical development strategies. Participating countries have already expressed their requests for technical assistance and both the IMF and the World Bank have developed their assistance strategies.

Six countries are currently participating in the Labor Statistics Module – Liberia, Malawi, Mozambique, Sudan, Swaziland, and Uganda.

Terms of Reference

Background

The launch workshop of the Labor Statistics Module was held in Kampala, Uganda, May 21-25, 2007. Six countries participated in the workshop – Liberia, Malawi, Mozambique, Sudan, Swaziland, and Uganda. In addition to the six countries participating in the labor statistics module, Botswana participated as an observer. During the launch workshop, each country developed three priorities and drafted a work plan to guide to act as a

living document for the duration of the technical assistance and to serve as an information base from which the TOR for each mission can be drawn up.

One of the common needs expressed by each country was the need for technical assistance in developing a labor survey and measuring informal sector activities. It was agreed by all participating countries, the module manager, and the GDDS Manager for the World Bank that a workshop would be held to provide technical assistance to meet this need.

Purpose of the assignment

The purpose of the assignment is to develop and conduct a workshop on designing labor survey and measuring informal sector activities. The workshop will be conducted with assistance from the staff of Statistics South Africa who will provide presentations on their experience conducting labor surveys and measuring informal sector activities in the African context.

One staff member of the U.S. Bureau of Labor Statistics, who is currently serving as the module manager, will participate in this workshop to improve labor market statistics in several countries in Africa. This staff member will serve as a trainer and consultant during the workshop.

The BLS trainer, drawing on his knowledge of and experience with labor statistics, will coordinate the workshop and lead afternoon work sessions following presentations by the staff of Statistics South Africa. The topics that will be included are: survey design, sampling approaches, questionnaire content, questionnaire design, data collection and processing, data analysis, and data dissemination practices. In addition, he will update the "reader" of relevant articles and other documents on labor statistics prepared for the launch workshop to include additional materials and presentations relevant to the workshop. The reader will be on a compact disc. The trainer/consultant will develop a checklist that can be used to guide throughout the program.

At the workshop the BLS trainer/consultant will collaborate with the World Bank GDDS Manager and the staff of Statistics South Africa to inform the participating countries about designing labor surveys and measuring informal sector activities.

See annexes for the details on the topic and the timing.

The total consultant time for the mission is 12 days divided as follow:

- 5 days actual mission time (May 19-23, 2008)
- 5 days consultant preparation time (May 12-16, 2008)
- 2 day report writing (May 27-28, 2008)

Following are the objectives and planned activities for the mission:

- Objective
 - Develop and conduct a workshop on the design of labor surveys and measuring informal sector activity.

- Activities
 - Prepare agenda;
 - Develop checklist;
 - Coordinate workshop program;
 - Lead work sessions;
 - Facilitate discussions;
 - Maintain notes on discussions and proceedings; and
 - Update and distribute reader on compact disc.

Skill requirements

The consultant needs relevant labor statistics experience and skills within the African context and needs to read and write English fluently.

Deliverables:

- Agenda;
- Checklist
- Detailed notes on discussion and proceedings; and
- Updated reader.

A concluding Mission Report as well as Mission Evaluation forms will form part of the final deliverable.

Duration

As noted, the total consultant time for the mission is 12 days with 5 days mission time, 5 days preparation time, and 2 day report writing.

Timing

May 19-23, 2008

Annexes:

Draft workshop agenda

Timing of the missions and topics

**Workshop
On
Labor Market Information**

**Labor Statistics Module
GDDS Phase II Project
World Bank**

Pretoria, South Africa

May 19-23, 2008

Monday, May 19

9:00 am

Welcome and Opening

Ronald Luttkhuizen, GDDS Manager for the World Bank (WB)
Brian Graf, Bureau of Labor Statistics (BLS)
Yandiswa Mpetseni, Statistics South Africa (Stats SA)

10:00 am

Status Reports from Participating Countries
Participants

1:00 pm

Lunch

2:30 pm

Overview of Labor Force Survey for South Africa
Staff, Stats SA

3:30 pm

Overview of Informal Sector Survey for South Africa
Staff, Stats SA

4:30 – 5:30 pm

Measuring Informal Sector Activities
Representative, Statistics Bureau, International Labor
Organization (ILO)

Tuesday, May 20

9:00 am

Survey Design
Staff, Stats SA

11:00 am

Sampling Approaches
Staff, Stats SA

1:00 pm

Lunch

2:30 – 5:30 pm

Work sessions
Ronald Luttikhuizen, WB
Brian Graf, BLS
Yandiswa Mpetseni, Stats SA

Wednesday, May 21

9:00 am

Questionnaire Content
Staff, Stats SA

1:00 pm

Lunch

2:30 – 5:30 pm

Work sessions
Ronald Luttikhuizen, WB
Brian Graf, BLS
Yandiswa Mpetseni, Stats SA

Thursday, May 22

9:00 am

Questionnaire Design
Staff, Stats SA

2:30 – 5:30 pm

Work sessions
Ronald Luttikhuizen, WB
Brian Graf, BLS
Yandiswa Mpetseni, Stats SA

Friday, May 23

9:00 am

Data Collection and Processing
Staff, Stats SA

10:30 am

Analysis and Dissemination of Data
Staff, Stats SA

1:00 pm

Lunch

2:30 – 5:30 pm

Wrap-up and Conclusion
Ronald Luttikhuizen, WB
Brian Graf, BLS
Yandiswa Mpetseni, Stats SA

Labor Statistics Module -- GDDS2 Project

Overview of workplan for: Malawi

Summary	Time Period 1	Time Period 2	Time Period 3
Priority 1 -- Develop LFS	Time allocation 60%	Workshop on LFS design and questionnaire	Time allocation 60%
Priority 2 -- Develop informal sector survey	Time allocation 20%		Time allocation 20%
Priority 3 -- Design of establishment survey on wages and salaries	Time allocation 20%		Time allocation 20%