The Italian System of Social Surveys

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Editors' note:

'Official Social Surveys in Europe' is a series of commissioned working papers whose major aim is to provide basic information on the availability of and access to major official survey data in Western Europe relevant for problem-oriented social reporting on Europe.

The working papers provide
- background information on data infrastructures;
- a summary of survey profiles and access conditions for a set of major social official surveys;

The papers are supplemented by detailed, standardised survey documentation made available on the Internet at the home-page of the subproject at the Mannheim Centre for European Social Research (MZES).\(^1\)

In addition to common documentation items, information also covers a set of major classification variables with respect to the availability and concepts/definitions. In compiling this information, authors could usually use as a point of reference meta-information made available to the project by Eurostat, Directorate E.

The information system on the Internet can be queried either to retrieve blocks of information for a single survey, or to compare single items (such as definition and measurement of household relationships) across a set of surveys.

\(^1\) Currently accessible at [http://www.mzes.uni-mannheim.de/projekte/mikrodaten/comi.htm](http://www.mzes.uni-mannheim.de/projekte/mikrodaten/comi.htm) (select 'Survey profiles')
The Italian system of social surveys

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1 Introduction

This paper provides a general description of the basic characteristics of the Italian system of social surveys. The paper is organized as follows. Section 2 and Section 3 describe the organization of the system, some related legal aspects and its main characteristics. Section 4 describes in some detail the various surveys. Access to the microdata files is described in Section 5, whereas Section 6 compares summary statistics from the various surveys. Finally, Section 7 offers some conclusions.

2 Organization and legal aspects

The National Institute of Statistics (Istituto Nazionale di Statistica or ISTAT) is the main, but definitely not the only, producer of socio-demographic and economic data in Italy. The institute is a legal person under public law and has an autonomous structure within the public administration. It is headed by a President, who is assisted by a Governing Board and a Board of Auditors. The President is chosen among Professors of Statistics, Economics and related fields, and is formally appointed by the President of the Republic.

The current role and organization of ISTAT was defined by the Legislative Decree No. 322/1989. This law contained several other important provisions. First, it created the National Statistical System (Sistema Statistico Nazionale or SISTAN), whose role is to coordinate and rationalize the flow of statistical information generated by the numerous Italian data-producers. Second, it defined the obligations of private individuals in terms of information provision. Third, it identified the main principles to be followed with reference to confidentiality and protection of personal data.

* The views expressed herein are ours and do not necessarily reflect those of the Bank of Italy.
The members of SISTAN are: (i) ISTAT, (ii) other public statistical bodies (INEA, ISAE and ISFOL), (iii) the statistical offices of governmental departments and autonomous authorities, (iv) the statistical offices of Regions, Provinces, municipalities, local public health care units, chambers of commerce, etc., and (v) any other public statistical agency as determined by the government. Private bodies can also be included in SISTAN conditionally on government approval.

Some important producers of statistical information are not members of SISTAN. The main one is the Italian Central Bank (Bank of Italy), whose statistical production is by no means confined to monetary and financial aggregates. Of special importance, from the viewpoint of this paper, is the Bank of Italy’s Survey on Household Income and Wealth (SHIW), which represents one of the most widely used sources of information on socio-demographic characteristics, labor force status, income, savings and wealth of the Italian population.

ISTAT provides coordination and technical assistance to SISTAN by setting common standards and methodologies, and by establishing the organizational aspects of the national statistical system. Formal coordination is carried out by the Policy-making and Coordinating Committee for Statistical Information (Comitato di Indirizzo e Coordinamento dell’Informazione Statistica or COMSTAT), chaired by the President of ISTAT. Every year, COMSTAT determines the National Statistical Program (Programma Statistico Nazionale or PSN), which specifies all surveys and researches that will be carried out by SISTAN during the next three years period.

A related body is the Commission for the Protection of Statistical Information (Commissione per la Garanzia dell’Informazione Statistica), that depends directly from the Prime Minister and whose Chairman is included in the Governing Board of ISTAT. The aim of the Commission is to monitor the impartiality and thoroughness of national statistical work, as well as the quality of the statistical methodologies and data-processing techniques, and compliance with regulations on confidentiality and protection of personal data. It also ensures the compliance of surveys with the directives of international and European Community organizations. Finally, it advises the authority in charge of protecting personal data (Garante per la Protezione dei Dati Personalì).

3 Basic characteristics

The system of surveys carried out within the SISTAN is formalized by the PSN, which lists all surveys that are expected to be carried out during the next three-year period, broken down by thematic area.
and by the body in charge. Concerning social surveys, the PSN distinguishes three main thematic areas – census, economic surveys, social surveys – with a further breakdown in sub-areas.

For each thematic area, the PSN sets objectives and priorities that each planned survey should meet. In particular, all surveys belonging to the same area should meet the same basic set of objectives. At least in principle, this should ensure coordination among them.

The main surveys contemplated by the PSN for the period 2000–2002 are:

1. Census: 14th Decennial Census;
2. Economic surveys – Labor costs and employment indicators: Survey on Labor Costs (SLC), year 2000;
3. Social surveys – Labor market: Labor Force Survey (LFS);
4. Social surveys – Households and various social aspects:
   - Multiscope Household Survey (MHS), general part;
   - Household Budget Survey (HBS);
   - European Community Household Panel (ECHP);
   - Pilot study of the Personal Income Survey (PIS).

All these surveys are carried out by ISTAT. The ECHP is carried out on behalf of the Statistical Office of the European Communities (Eurostat), that also provides centralized support and coordination in order to ensure comparability of the survey across countries.

The surveys listed in the PSN have a unique legal status, because the law establishes the obligation for public administrations, institutions and other public bodies to provide the data and the information requested. Individuals and private bodies are legally obliged to answer a survey if it belongs to a special list signed by the Italian President of the Republic. All surveys listed above fall in this category. After 1996, the law allows nonresponse to questions on sensitive subjects (which subject is considered sensitive is strictly regulated by law). Some of the questions asked in the ECHP and Multiscope survey are of this type.

As a complement to the traditional sources of information, namely the decennial census and the various sample surveys, administrative records are increasingly being used. One example is the
information on pensions, which is increasingly being based on the Central Register of Pensioners (Casellario Centrale dei Pensionati) jointly maintained by ISTAT and the National Social Security Institute (INPS). In general, administrative data provide much larger sample sizes and suffer much less the problems of nonresponse, attrition and measurement errors that are typical of sample surveys. However, because they are collected for administrative reasons, they tend to lack key information such as education, marital status, household background variables, etc.

4 Survey details

We now provide a description of the main features of the various surveys. Section 4.1 presents the population census, Section 4.2 presents the sample surveys carried out by ISTAT, whereas Section 4.3 presents the Bank of Italy’s SHIW.

4.1 The Decennial Census

The first census of the Italian population goes back to 1861, immediately after the unification of the country. From 1951, the population census is done jointly with the census of dwellings. The population census has been carried out at regular intervals of 10 years, for a total of 13 censuses. The 14th census is scheduled for October 2001 and will collect information on about 21 million households, 57 million persons and 25 million dwellings. The 2001 census will comply with the “Recommendations for the 2000 censuses of population and housing in the ECE region” issued by Eurostat and the United Nations in order to coordinate and harmonize the census information across member countries.

The basic administrative unit for census purposes is the municipality, of which there are about 8,100 in Italy, with ISTAT providing support and coordination through its central organization and local offices. In order to assess changes in the degree of geographical mobility of the population, the 2001 census is expected to define the target population rather broadly by including not only the resident population of a specific municipality, but also those who are not legal resident and are only temporarily or occasionally present for a variety of reasons (study, commuting to work, seasonal work, etc.).

Based on an initial pilot study, the following definitions have been proposed:

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1 Detailed standardised documentation of these surveys will soon be available for queries via Internet at EuReporting’s home-page (http://www.mzes.uni-mannheim.de/projekte/mikrodaten/comi.htm).
1. Resident population: Those who usually live in a municipality and either are legal residents, that is, they are included in the municipality’s anagraphic list at a given address (the one at which the census questionnaire is being delivered), or fulfill all requirements for becoming legal residents, that is, they never return to the place where they are legally resident.

2. People temporarily resident: Those who occupy a given dwelling (the one where the census questionnaire is being delivered), that is not their legal place of residence, but periodically return to the place where they are legally resident;

3. People occasionally present: Those who at the date of the census (by convention, October 14) are present at a given dwelling (the one where the census questionnaire is being delivered) for occasional reasons.

This taxonomy should help determine the following aggregates:

1. Resident population: Consists of the legal resident of a given municipality, even if they are temporarily absent;

2. Present population: Consists of the resident population, those temporarily resident and those occasionally present.

3. Population “using” the territory of a municipality: Consists of the legally resident who are present plus those who are temporarily resident.

The “legal population” of a municipality corresponds to the legally resident population of the municipality. The population “using” the territory of a municipality corresponds instead to the population that lives, studies or works in the municipality, using its services independently of being a legal resident or not.

The census adopts two questionnaires: a personal questionnaire submitted to each adult household member and a household questionnaire submitted to a household representative and containing information on the household and the dwelling. In addition to the usual demographic information (sex, age, place of birth and citizenship), the census questionnaire asks information on kinship, cohabitation, marital status and year of marriage. The goal is to obtain a detailed picture of the types of living arrangements, the number of children in a household, and the number of people who
live alone. The questionnaire also asks the highest level of education completed and information on school attendance at the date of the census. Those aged 14 or older (14+) are asked to report their main activity status and, if they work, the usual number of weekly hours worked. Those who are employed are asked to answer additional questions on their job, whereas the unemployed are asked to provide information on their last job. An important section of the questionnaire focuses on people’s mobility. People are asked about the reasons for being temporarily present. They are also asked to indicate the place where they work or study, the time it takes to reach it, and the mode of transportation. Finally, the questionnaire asks foreign citizens the reason of their presence in Italy, the month and year they entered the country, their knowledge of the Italian language, and the possible presence of relatives in the country.

In the census of dwellings, the questionnaire asks about tenure, the size and physical characteristics of the dwelling, and its general sanitary conditions.

4.2 The ISTAT sample surveys

The ISTAT sample surveys share several common features. First, the target population consists of all private households throughout the national territory. De facto households are considered, not legal ones.

Second, the sampling procedure is two-stage sampling, with municipalities as primary sampling units and households as secondary sampling units. Municipalities are stratified by population size. As a general rule, municipalities with a population above a certain threshold are always included, whereas the smaller ones are selected at random. The sampling frame is the population register.

Third, the surveys are normally run by municipal employees. The usual interviewing method is face-to-face personal interview. In the HBS there is a single respondent (typically the head of the household or the spouse of the head) who answers for all household members, whereas in the other surveys all adult members are separately interviewed.

Fourth, response is compulsory but there is no legal enforcement. Response rates tend to be high (above 80 percent), but sampling design takes into account lack of co-operation by the municipalities.

The main differences between the various surveys have to do with their goals, nature and periodicity. The different goals are mainly reflected in the questionnaire. The HBS and the MHS are repeated cross-sections, the LFS is a rotating survey, the ECHP is a longitudinal survey. Turning to
periodicity, the HBS is monthly, the LFS is quarterly, whereas the ECHP and the MHS are annual. The different goals of the surveys and the differences in the nature and periodicity make it hard to achieve full comparability. Coordination is also limited, which leads to some overlap. This is not necessarily a bad thing, however, for it offers the possibility (largely unexploited) of cross-checking the information provided by the various surveys.

Comparability across countries, especially at the EU level, is very good for the ECHP and the LFS, but less good for the other surveys. The ECHP is specifically designed and coordinated by Eurostat in order to provide comparable information across the member states of the EU. Starting with 1993, the second quarter (April) of the LFS is part of the European Labor Force Survey conducted in the Spring of each year by Eurostat in the member states of the EU. Finally, as far as the HBS is concerned, Eurostat is in the process of harmonizing to a predefined format the household budget surveys conducted within the EU.

4.2.1 The Labour Force Survey

The LFS (Indagine Trimestrale sulle Forze di Lavoro) was started in 1959. Its current design was introduced in October 1992, when the survey was modified following the guidelines set by Eurostat in order to ensure comparability of the statistical information on employment throughout the European Union (EU).

The LFS is a rotating quarterly survey (with rotation scheme 2–2–2) currently covering over 200,000 people. The target population consists of all private households throughout the national territory. Interviews take place in January, April, July and October.

The main purpose of the LFS is to classify people into the categories of “employed”, “unemployed” and the residual category “out of the labor force”, each category being defined according to the recommendations by the International Labour Office (ILO). In addition to the core part, that has not been changed since 1992, the questionnaire may include short supplementary sections on specific themes. One of the main limitations of survey is that it collects no information on individual incomes and wealth holdings.

Because of its rotation scheme, the LFS has a longitudinal dimension with people followed for a period of up to 15 months. Linkage of records of the LFS has been problematic, however, because of the lack of a unique personal identifier. For the year 1999, ISTAT releases matched files of the LFS
obtained by matching individuals on the basis of time invariant personal information (household identifier, gender, date of birth, etc). The presence of attrition and reporting errors, however, do not allow a complete matching. On a quarterly basis, about 92 percent of the potential sample has successfully being matched. This percentage reduces to slightly less than 90 percent for the annual matches. As an alternative to the matched files, retrospective information may be used because the April questionnaire contains a set of questions on labor force status in the same month of the previous year.

**Personal information.** The basic personal information available consists of sex, age, marital status, educational level and region of residence. For those who are aged 15+, the survey collects information on employment status, the characteristics of the main job, the sector of employment, the number of weekly hours worked, whether the job is full-time or part-time, permanent or temporary, and additional information on secondary jobs. Those who do not have a job are asked to provide information on their past work experience. Those who are looking for a job are asked to indicate the nature of their search activity, the length of the unemployment spell, the type of job they search for, and a personal estimate of their reservation wage, defined as the minimum wage at which they would be willing to take a job with the desired characteristics.

**Household information.** Although the basic sample unit is the household, ISTAT does not release the household identifiers, thus making it impossible to link people living in the same household. Further, the public-use files contain very little background information on the household a person belongs to.

4.2.2 The Household Budget Survey

The HBS (*Rilevazione sui Consumi delle Famiglie Italiane*) is carried out by ISTAT since 1968. Its main object is to collect information on the consumption consumption patterns of private households and its main purpose is to provide the quarterly estimates of aggregate consumption and the budget share calculations necessary for constructing the consumer price index.

The survey is a repeated monthly cross-section, with each household interviewed only once. Important changes to the original questionnaire and sampling design were introduced in 1973, 1985 and 1997. Comparability is therefore good within subperiods.
The sample size during the period 1987–1996 was about 3,000 households per month. The current survey has a smaller sample size of about 2,000 households per month. This smaller sample size has been justified with the desire to reduce non-sampling errors by devoting more resources to data quality.

The HBS has a single respondent (typically the head of the household or the spouse of the head) who answers for all household members. The survey interview consists of two parts. In the first part, at the beginning of the month, the interviewer compiles some of the questionnaire and leaves behind two booklets: the “purchase log”, where household members record all consumption expenditures, and the “notebook”, where households with a garden or an orchard record the amount of own produced food. In the second part, at the end of the month, the interviewer collects the purchase log and the notebook, prepares the summary of household expenditures, and completes the questionnaire with the remaining information.

*Personal information.* In addition to the standard demographic variables (sex, age, marital status, higher schooling level completed), each person aged 15+ is asked to define his/her activity status, according to the definitions used in the LFS and the MHS.

*Household information.* The survey provides information on the following expenditure categories: food, clothing, health, housing, energy, transports and communications, leisure and education. It also provides detailed information on the purchase of durables (furniture, appliances, cars, etc.) during the last three months. The survey also collects information on the household accommodation, the type and physical characteristics of the dwelling, tenure, expenditure on repairs and maintenance, and ownership of a secondary home. The HBS also contains some information on household income and savings. Household income is monthly net household income, discretized in 12 income classes, whereas savings are measured on an annual basis.

Until 1996, the survey asked to indicate the main source of income in the six months before the interview choosing among the following: wages and salaries and self-employment earnings, pensions, other transfers, asset income, family support. From 1997, the survey instead asks to indicate the percentage of each income source on total income.
4.2.3 The Multiscope Household Survey

The MHS (Indagine Multiscopo sulle Famiglie) is a repeated annual cross-sectional survey covering about 20,000 households and 60,000 people. The first survey was carried out in 1987. Its current structure was introduced in 1993. It consists of a general part, repeated every year, and a supplementary part on specific themes which may or not be present. In particular, every 3–4 years, the MHS includes a health module containing a number of health-related questions. For simplicity, we focus on the general part, although the supplementary modules contain important information on certain social phenomena.

The objective of the general part of the MHS is to provide information on several aspects of the daily life of a household and its components. Special attention is paid to the health status of the individuals and their use of health services. The survey contains little information on income, and none on wealth. The response rate is above 80 percent.

Each household is interviewed only once. Proxy interviews are allowed for people who are not present. The interview consists of several questionnaires, some of which are compiled by the interviewer and some are self-compiled.

Personal information. In addition to the standard socio-demographic information (sex, age, marital status, education, relationship with the reference person, region of residence), the survey asks the year of the current marriage, the previous marital status and the relationships with the parents (for people aged less than 65) and the children (for people aged 45+). As for all other ISTAT survey, persons are asked to define their activity status according to the definitions used in the LFS. Those with a job are asked to indicate the type of occupation and the industry of employment. Because of its specific purposes, the survey asks everybody to indicate the number of hours of household and non-household work, independently of the reported activity status, and the activity status, type of occupation and industry of employment in the previous year. The MHS contains limited information on income, as it only asks which is the main income source. The breakdown is the same as for the HBS. The MHS focuses instead on health status, asking people to evaluate their general health status and the intensity of use of drugs, and eating habits (consumption of various types of food and beverages). Finally, the survey also asks people to indicate whether they are affected by chronic illness or permanent disability that imply a loss of personal autonomy,
specifying the pathology that they suffer.

Individual living conditions are investigated by asking how people access public services, bank services and public transportation. There is also a set of questions dealing with various aspects of social life, including memberships and unpaid social work.

*Household information.* Just like the HBS, the MHS collects information only on monthly net household income, discretized in 16 income classes. The questionnaire asks however the level of satisfaction with the general economic condition of the household and the adequacy of economic resources available. As an indirect assessment of household wealth, the survey collect information on tenure, the characteristics of the dwelling and the area where it is located, and the intention to change accommodation within the next 12 months. From 1997, the survey also collects some information on the holding of certain types of durables. Unfortunately, this information is not fully comparable with the one from the HBS, which is much more detailed.

4.2.4 The European Community Household Panel

The ECHP is a standardized multi-purpose annual longitudinal survey carried out at the level of the EU. It is centrally designed and coordinated by the Eurostat, and covers demographics, labor force behavior, income, health, education and training, housing, migration, etc.

The objective of the ECHP is to represent the population of the EU at the level of households and individuals. It aims at being both cross-sectionally and longitudinally representative, with changes in the population over time reflected by the continuous evolution of the sample – through births to sample households and the formation of new households from the split off of existing ones. This aspect differentiates the ECHP from other panels that only follow a few cohorts of individuals as they age. In this, and many other dimensions, the ECHP is patterned after the Panel Study of Income Dynamics conducted in the USA by the Survey Research Center at the University of Michigan.

Within each household, the ECHP distinguishes between sample and nonsample persons. Sample persons are all individuals belonging to the sample drawn for each EU country in the first year of participation plus children born after the first wave to a sample woman. Nonsample persons are all other individuals. Sample and nonsample persons may or may not be eligible for interview. Sample persons are eligible if they belong to the target population (that is, live in a private household within the EU) and are aged 16+. In addition, eligibility of nonsample persons also requires them to live
in a household containing at least one sample person. The number of households interviewed every year in Italy is about 7,000 with about 18,000 people aged 16+.

According to Eurostat’s guidelines, the households from wave \( t - 1 \) that are passed to wave \( t > 1 \) for follow-up are: (i) those interviewed, and (ii) those not interviewed because of non-contact, physical incapacity or inability to respond, or refusal which is considered to be “less than final”. To the follow-ups are added newly formed households containing at least one sample person. Excluded from follow-up are the households that gave a final refusal to respond in wave \( t - 1 \) and those that have moved to a country outside the EU or have been entirely institutionalized. These households are only “traced” for future follow-up in case they return to the study population. Sample addresses or households found to be ineligible or nonexistent are dropped. Starting from wave 3, households not interviewed in two consecutive waves are also dropped.

Turning to persons, sample members are always followed within the EU until they die or become ineligible. Sample persons who moved to a country outside the EU or were institutionalized are “traced” for future follow-up in case they return to the study population. Nonsample persons are not followed if they move into a household not containing sample persons.

The interview is carried out at the household’s address. One of the key features of the ECHP is the adoption of a common questionnaire (the “Community questionnaire”) centrally designed by Eurostat. The questionnaire consists of a household register, mainly for record keeping and control of the sample, a household questionnaire submitted to a “reference person” (usually the household head or the spouse/partner of the head), and a personal questionnaire submitted to all eligible household members.

The questionnaire focuses on household and personal income, especially earnings and public transfers, but also collects detailed information on demographic characteristics, labor force behavior (including job search activities), health, education and professional training, housing, migration and geographical mobility, at both the household and the personal level.

The overall response rate of Italian households has been about 90 percent in the first three waves, whereas attrition has not exceeded 5 percent. This is the best record among all countries covered by the survey.

*Personal information.* In addition to the standard socio-demographic information, the survey records the dates of important changes in a person’s life, such as the date when the person acquired
the current marital status, the date the current schooling level was attained, and the date of migration to the current place of residence. People are asked to indicate their activity status, the characteristics of the current job and the previous job, the month and year the current job started, and information on job changes. Job search is studied in considerable detail, as the survey asks to indicate the desired workhours, the length of the search, a subjective assessment of the probability of finding a job and the minimum net wage desired, the offers received, those accepted and those rejected. This wealth of information is not available in other surveys, included the LFS. The ECHP asks for detailed information on the types of income received (earnings, asset income, transfers, other income) in the year before the survey. Earnings are net of payroll and income taxes, and the survey collects separate information on annual earnings and current monthly earnings. For some income types, instead of actual amounts people may provide income brackets. Finally, the survey asks people whether they have been hampered in daily activities by any physical or mental health problem, illness or disability.

**Household information.** Individuals can easily be matched to their household using the unique person and household identifiers. The demographic information collected by the ECHP includes the household dynamics (new entry and exit) and and the relationships between the various household members. The survey also collects information on total household income and its components. Finally, the survey asks information on tenure of the dwelling and its physical characteristics, but the detail is not as fine as for the HBS.

### 4.2.5 The surveys on labor costs and the structure of earnings

ISTAT runs two surveys specifically designed to collect information on labor costs (*Rilevazione sulla Struttura del Costo del Lavoro* or SLC) and the structure of earnings (*Rilevazione sulla Struttura delle Retribuzioni* or SSE). Both surveys are part of the European Statistical Program and should be carried out every four years, alternating every two years between the SLC and SSE.

The SLC was first carried out in 1998 with reference to the year 1997. The target population included all firms operating in the industrial and the private service sector (excluded transports and communications) with at least 10 employees. The sample size was about 12,000 firms, and consisted of all firms with at least 500 employees and a random sample of firms with a number of employees between 10 and 499. The next survey will be carried out in June 2001 with reference to the year 2000, and the sample will consist of all establishments (not firms) with at least 250 employees plus
a random sample of establishments with a number of employees between 10 and 249.

In addition to information on the structure of wages and salaries paid by the firms and the number of hours worked, the survey also collects information on temporary jobs and special contracts.

The SSE was first conducted in 1996 with reference to the year 1995. The sampling procedure is two-stage sampling, with establishment in the industrial or private service sector as primary sampling units and employees as secondary sampling units. The sample size of the 1995 survey was about 103,000 dependent employees. The next survey will be conducted in 2003 with reference to the year 2002.

The survey focuses on differentials in hourly and monthly wages by sex, age, educational attainments, industry and occupation of employment, and geographical region.

4.2.6 The pilot study of the Personal Income Survey

The PIS (Rilevazione del Reddito Individuale) is an annual cross-sectional survey with a longitudinal component, still at the planning stage. It is expected to replace the ECHP after its end in the year 2002. The planned sample size will be between 15,000 and 20,000 households. The pilot study is expected to be carried out in 2002 after the 14th Census and will cover approximately 1,000 households.

The survey will focus on labor force behavior, income, education, geographical mobility and social exclusion. It will also contain information on the characteristics of the dwelling and holding of certain types of durables (such as PCs).

4.3 The Bank of Italy’s SHIW

The SHIW (I Bilanci delle Famiglie Italiane) is a repeated cross-sectional survey first conducted in 1965. It was carried out annually until 1987 (except for 1985), and every two years until 1995. The last survey, conducted with reference to the year 1998, covers about 8,000 households and 20,000 people. From 1989, the survey contains a panel component. Currently, about half the sample (4,000 households in all) is included in the panel.

The survey is conducted on behalf of the Bank of Italy by a private agency. The agency is not always the same and may change from one survey to the other. Sampling design and interview methods have also changed through time. The sample design remained essentially the same until 1983. It was changed in 1984 and further revised in 1986 following the LFS sampling procedure.
Until 1995, interviews were based on the paper-and-pencil method. The most recent 1998 survey was based almost entirely on computer-assisted-personal-interview (CAPI).

The survey units are *de-facto* households. All household members (including those aged less than 15) are asked to indicate their income in the year before the survey. Questions about the household are submitted to the head of the household. The questionnaire consists of a general part, approximately the same across surveys, and some special sections submitted to different subsets of the sample to shorten the duration of the interview. Interviews are carried out during the first months of the year.

Response rates vary, but they are never higher than 60 percent. Middle-aged middle class households tend to respond more. There is no special inducement to respond given that the Bank of Italy is not a SISTAN member: the reputation of the Bank of Italy and the social value of the survey are arguments used to elicit co-operation.

*Personal information.* In addition to the standard socio-demographic information, the SHIW collects detailed information on labor force status and personal income, with a fine detail by income source. Unlike the ISTAT surveys, however, labor force status is defined with reference to main activity in the year before the survey. The definition of unemployment is also different, as the SHIW does ask a person whether he/she is actively seeking a job and is ready to work.

The definition of income remained unchanged until 1986, when it was adapted in order to make it consistent with the definition used by national accounts. All income components are recorded net of taxes. It is worth noting that, until the availability of the Central Register of Pensioners, the SHIW was the only source of microeconomic information on pensions recipiency.

The SHIW also contains a set of retrospective questions whose aim is to help reconstruct individual work careers. In particular, the survey collects information on the number of jobs (including occasional ones) held during the working life, the age when the person took his/her first job, whether the person ever paid social security contributions, and whether the person lost any job.

Finally, the survey provides some information on health status and social and qualitative aspects of personal life, including information on the household of origin of each person.

*Household information.* As for the ECHP, individuals can easily be matched to the household they live in. The household income is computed by aggregation, starting from the individual incomes.
The survey also collects information on household savings and wealth. In the more recent waves special attention has been devoted to the household holding on financial assets and the frequency of use of various financial instruments. Household aggregate expenditure for consumer goods is also collected, separately for durables and non-durables.

Given the importance of the SHIW for the study of the social and economic conditions of Italian households, data quality has been investigated in detail. The available evidence shows that both data quality and comparability with the ISTAT surveys have improved over time. Special attention has been paid to the quality of data on income and wealth. In general, the data on income appear to be more reliable than those on wealth. Among the income components, the data on wages and salaries are appear to be reliable than those on self-employment income. Similarly, the data on work-related pensions appear to be more reliable than those on other kinds of public transfers.

5 Data access

The problem of how to find a balance between privacy and the need of statistical information is still far from reaching a solution. The task of defining a satisfactory approach is complicated by the fact that no convincing result is available on the actual risk of identifying survey participants.

As discussed in the previous sections, the main sources of information on households and individuals consist of administrative data and sample surveys. The type of controls and limitations on publicly released data are quite different in the two cases. A general set of rules on the treatment of personal data is contained in the Legislative Decree No. 322/1989, the same one which reorganized ISTAT and created SISTAN. The member of SISTAN have the right to obtain and process for statistical purposes information on individuals and other entities, but are obliged to respect the statistical secrecy. Public release of microdata is therefore not allowed in general.

There are two important exceptions to this rule. First, it does not apply to data drawn from public registers or, more generally, from lists or documents that are openly accessible to the public. Second, data from sample surveys can be released if they have been anonymized and contain no key that may allow identification of the responding person. However, it is still unclear what personal information must not be released in order to avoid identification of the respondents. At the current stage, things appear to be decided on an ad hoc basis, taking into account the nature and characteristics of each survey. Thus, for each survey considered in this paper, we shall briefly describe what
are the restrictions on the public-use files of microdata. More detailed data can only be obtained in joint research projects with ISTAT.

1. **Decennial Census**: Regarding the 13th Census, the data are released in three separate files, one for the dwellings, one for the households and one for the individuals. The latter only covers a random sample of 1 percent of the total population and does contain the household identifiers. The personal information in the household file is limited to the head of the household.

A further limitation on all three files has to do with the place of residence, as only municipalities with more than 100,000 inhabitants are separately identified.

2. **MHS**: The public-use files are of two types: one contains information on the region of residence, the other only contains information on broad geographical areas (macro-region) and the size of the municipality (in classes). The two files cannot be matched. No other limitation applies.

3. **HBS**: The public-use data also consist of two files that cannot be matched. The first contains the information on all household members, with geographical information restricted to the macro-region. The second file also contains the region of residence, but the information is in this case limited to the household head.

4. **LFS**: The public-use files do not contain the household identifiers and some information at the individual level. The excluded personal information consists of the date of birth, the province of residence and the interview wave. The lack of this information prevents statistical matching across waves of the LFS. From 1999, ISTAT also releases matched files of microdata which, given the 2–2–2 rotation scheme of the survey, contain about half of the sample interviewed in each wave. These files, however, cannot be matched with the cross-sectional files.

5. **ECHP**: In December 1999, Eurostat released a public-use file (the User Data Base or UDB) covering the first three waves of the panel. The one covering the first four waves is expected in 2001. The anonymization criteria adopted to create the UDB restrict the information available on age, educational attainments, occupation and industry of employment, income, and region of residence. Specifically, information on the upper end of the age distribution has been restricted by bottom-coding year of birth at 1909. Information on educational attainments have been collapsed to the very coarse three-category ISCED level. Occupational codes and sector of
activity are restricted to a level of aggregation intermediate between 1 and 2 digits. Income components are aggregated at an intermediate level and converted to annual net amounts. In particular, most of the detail about pensions is lost in the UDB which only distinguishes between three aggregates: old-age related benefits, survivor pensions and sickness/invalidity benefits. Finally, the regional information is at coarse level of NUTS.

6. **SHIW**: The survey is easily available upon request, but the geographical information in the public use files is restricted to the region of residence. The data are available on a CD covering all surveys between 1977 and 1998. Documentation in English is available for the last three waves.

The public-use files from the ISTAT surveys may be purchased at a price that varies between academic and nonacademic users, whereas the data files from the Bank of Italy survey are provided at no charge.

### 6 Some comparisons

This section presents some summary comparisons between the various surveys.

#### 6.1 Basic socio-demographic characteristics

Table 1 and Table 2 compare the LFS, the HBS, the MHS, the ECHP and the SHIW with reference to the year 1995. We only present summary statistics for the main socio-demographic and economic variables, namely sex, age group, educational attainments, geographical region and occupation of employment. We confine attention to the population aged 17 or older because the ECHP user database contains no information for younger people. Table 1 shows summary statistics based on unweighted data whereas Table 2 shows the corresponding weighted estimates. A comparison of the two tables enables one to evaluate the effects of using the sample weights. Some word of caution is however necessary. The definitions of geographical region and educational attainments differ slightly between the ECHP and the other surveys, because the ECHP follows the NUTS criteria for regions and the ISCED criteria for education, while the other surveys report a more detailed classification.

Other differences have to do with the definition of activity status. Unlike the LFS, the MHS and the HBS, the ECHP separates those who work at least 15 hours per week from those who work
In the estimates presented here, these two categories are aggregated into the single category of “employed”. Moreover, the ECHP does not distinguish between the unemployed and those seeking a first job, while the other surveys do.

SHIW poses different problems because its main purpose is to identify all income recipients within a household. Thus, we are able to distinguish those who receive labor pensions from those who receive non-labor pensions, but we do not know whether the latter should be considered as “retired”, “houseworkers” or “other inactive” according to the ISTAT classification. In the summary statistics presented below, these individuals are included in the “retired” category.

A comparison of Tables 1 and 2 shows that the empirical distribution by sex is very similar for all five surveys, with little differences between the raw and the weighted data. Table 1 shows that the LFS (and partially the SHIW) tends to overrepresent the elderly population (people aged 55 and older), while the ECHP tends to overrepresent the younger cohorts. Given the large differences in educational attainments of the various cohorts, this also implies some differences across surveys in the distribution by education. These differences are reduced when weighted data are considered. Finally, unlike the other surveys, the ECHP tends to overrepresent those living in the South. This effect is only partially compensated by the weighted estimates.

### 6.2 Employment rates

The four surveys conducted by ISTAT provide fairly homogeneous information on labor force status. This is because they ask a similar set of questions whose aim is to help classify the current activity status into the three mutually exclusive categories of “employed”, “unemployed” and “non-active”. The SHIW is instead concerned with the identification of income recipients and adopts a different classification of labor force status based on main activity in the year before the survey.

Table 3 compares employment rates in 1995 by sex and age group for the five surveys considered. The original micro-data have been weighted using the sample weights provided by each survey. For the HBS and the LFS, the data are annual averages of, respectively, monthly and quarterly employment rates. Percentage differences in employment rates between the various surveys are not very large for the central age groups (30–50), but become appreciable at both younger and older ages. In general, the HBS tends to overestimate male employment relative to the other surveys, whereas the SHIW tends to underestimate it. For female employment there is much less evidence
of systematic differences across surveys. Averaging across surveys, the male employment rate is 77 percent in the age group 50–54 and 58 percent in the age group 55–59, whereas the female employment rate is 34 percent in the age group 50–54 and 20 percent in the age group 55–59. These percentage rates are very low by European standards. The male rates are about 10 percent lower than the EU average in 1995, whereas the female rates are about 20 percent lower (see Peracchi 1998).

The various surveys also differ in the kind of retrospective information that they ask. The April questionnaire of the LFS contains a set of questions on labor force status in the same month of the previous year. Similar information is available from the ECHP and the MHS. The ECHP, the LFS and the SHIW also ask those who reported themselves as retired to indicate their past type of job and their past industry and occupation of employment. The ECHP and the SHIW further contain a set of retrospective questions whose aim is to help reconstruct individual work careers. In particular, the SHIW collects information on the number of jobs (included occasional ones) held during the working life, the age when the person took his/her first job, whether the person ever paid social security contributions, and whether the person lost any job.

An interesting aspect of the SHIW is that it also collects some prospective information, for example whether the person plans to retire within the next 12 months and, if not, the age when they plan to do so. Past waves of the SHIW also contain information on the expected level of the replacement rate.

7 Conclusions

The Italian system of socio-economic surveys suffers of important informational gaps. Until recently, no panel data was available for Italy thus making it very hard to study intertemporal behavior and to control for unobservable individual heterogeneity. The situation has now changed with the introduction of a panel component in the SHIW, the availability of the ECHP, and the recent release of matched microdata from the quarterly LFS.

The area where the information is more limited is income. In recent years, the gap has been partially filled by the availability of the ECHP, but the public use files of this survey are subject to stringent anonymization rules and the quality of the data still needs a careful investigation. Most of what we know about household and personal income still comes from the Bank of Italy's SHIW.
which is not part of the National Statistical System.

Another area where the information is lacking is living conditions, health and social relations of the elderly. This is a major problem given the increasing importance of the elderly and the oldest old in the Italian population. Launching a household panel survey, representative of the population that is retired or is at risk of retirement and similar to the Health and Retirement Survey in the USA, would therefore be of great importance for both research and policy making.

Ideally, the core information collected by such a panel survey should include, in addition to standard socio-demographic information on the household and its members, economic variables (especially current work activity and job characteristics, employment history, private pension coverage and characteristics of the pension plan, sources and composition of current income, real and financial wealth), health, social networks and social support. It would also be important to be able to link the survey information to administrative records and to ensure comparability with similar surveys carried out in other countries, especially in Europe.
References


Table 1: Distribution of the sample by main characteristics. Individuals aged 17 and more: unweighted data.

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Table 2: Distribution of the sample by main characteristics. Individuals aged 17 and more: weighted data.

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Table 3: Estimated employment rates in 1995 by sex and age group.

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Subproject "Comparative Official Microdata"

Direction: Prof. Dr. Peter Flora and Franz Kraus, Mannheim Centre for European Social Research (MZES)

This subproject of EUREPORTING aims at improving the knowledge about availability, content and comparability of major official surveys that are relevant for science-based social reports on Europe and at servicing interested users via Internet in an efficient way.

Work will cover the following topics:

- describing the evolution of the current survey systems in the field of social statistics at the national and EU-level (directory of surveys);
- documenting the profiles of major surveys and censuses (including questionnaires) relevant for socio-economic reporting on Europe and on access conditions to the microdata since the 1990ies;
- providing references to related literature;
- assessing the suitability of major national and EU-surveys for analytically oriented systems of comparative social reporting;
- reviewing of the legal situation and current practices in access to and dissemination of official microdata at the national and the EU-level, including the role of scientific infrastructural organisations as mediators between statistical offices and academia).

Research is carried out jointly by P. Flora / F. Kraus (MZES/Eurodata) and G. Schmaus (CEPS/Paco). It is part of an ongoing cooperation between the two research centres towards the establishment of a European infrastructure for research on Europe and on European integration.

Deliverables comprise working papers (source assessment reports for each country covered), a conference on 'Official Microdata for European Comparisons', a related reader, and dynamic meta-databases on Internet with information on major social surveys and data producing agencies.