

the Survey Statistician

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INTERNATIONAL ASSOCIATION
OF SURVEY STATISTICIANS



International Statistical Institute

INTERNATIONALE
ASSOCIATION
DES STATISTICIENS
D'ENQUETES



Institut International de Statistique

Letter from the President

During 2001-2003, the IASS's life continued to be active. The two main points to be mentioned are the changes in several key positions and the publications. These will be detailed below. The deep personal involvement of some of our members allows the Association to keep lively.

Administration

After he took over the position of Executive Director from Christophe Lefranc last year, Alain Charraud is, in his turn, compelled to leave it for professional reasons. He will be replaced by Michel Péronnet.

A major undertaking in the last two years has been the modernisation of the membership database. The Secretariat is now close to a conclusion. A good and properly updated database will facilitate the Association's relation with its members and with the ISI permanent Office. Our database will be fully compatible with that of ISI and other sections members, kept by the Permanent Office. A clear example of this compatibility is given by the recent ISI directory where it has been possible to include all IASS members.

INSEE (France) continues to provide the Association's Secretariat with all necessary facilities (personnel, offices, etc.). Without this support, IASS could not live as it does and be as lively as it is, in spite of the very low dues paid by members. I personally and directly expressed our common gratitude to the Director General of INSEE, Jean-Michel Charpin.

"The Survey Statistician"

At the beginning and during many years, the review was not very steady in terms of contents, but one can now consider it has found

its place and role. The Association owes many thanks to the editor, Leyla Mohadjer, who provided a considerable input in spite of the difficulties she met. After four years, Leyla hands over her position, as it had been understood when she accepted the function. Our future editor will be Steve Heeringa. Many thanks to him for having accepted to ensure the life of the "Survey Statistician" in the coming years.

Of course, some problems remain. In particular, Country reports are sometimes criticized for being too descriptive and informative enough. On the other hand, the "Questions-Answers" column has been inactive for several years.

The Association is greatly indebted to the institutions who printed and disseminated the review (ABS for the English version and INSEE for the French one) and thus made it possible to maintain a permanent link between the members and to Statistics Canada who ensured translations between our two official languages.

The Web-site

The web-site has also undergone a major change. Its editor, Fred Vogel, resigned from his position for professional reasons and has been replaced by Eric Rancourt. A challenge for the coming years will be: how to better match the Association's two main means of communication: the review and the web-site.

Other publications

In these last two years, an unusual number of publications have been issued by the Association or with its contribution.

One is traditional: the proceedings of the previous ISI Session (providing the complete text – and not only a summary – of the papers delivered in meetings organised or co-organised

by IASS) which have been edited by the chairman of the IASS Programme Committee for the Seoul session, David Binder (who was Vice-President of the Association during 2001-2003), and by Eric Rancourt. The proceedings have been printed and disseminated by the Australian Bureau of Statistics.

Two exceptional volumes have also been issued: the "IASS Jubilee Commemorative Volume – Landmark Papers in Survey Statistics," and "Leslie Kish, Selected Papers."

The "Jubilee Volume," like the proceedings, is a publication of the Association. It was edited by an ad hoc committee chaired by Gad Nathan, printed and disseminated by the Australian Bureau of Statistics. Many thanks to the editors and to ABS and its Director, Dennis Trewin.

The Kish Volume, a commercial book, has been edited by Graham Kalton and Steve Heeringa and published by Wiley and Sons. This has been made possible thanks to the commitment of Mrs. Kish and a strong contribution of the Kish Foundation who ordered about half of what was needed for every member of the Association to receive a copy for free, the other half being paid directly by IASS. This combined action of Leslie Kish's heirs and IASS is to be seen as a tribute to the great statistician who left us in 2000.

The membership Directory, which could not be published in 2001, has been disseminated by the end of 2002, thanks to INSEE's contribution. In addition, ISI has recently published a membership Directory which includes for the first time, in addition to ISI and other sections members, all IASS members, including those belonging to IASS only. May this contribute to reinforcing links between IASS and the rest of the ISI family.

Cochran-Hansen Prize

The Cochran-Hansen Prize is awarded by the Association to a young statistician from a developing or transition country for the best paper on survey research methods. The winner for 2003 is Mr. Krishna Mohan Palipudi

(India) for his paper on "A multi-level approach to explore the influences of interviewers on item non-response in complex surveys." The jury who scrutinized the candidates' papers was chaired by Chris Skinner.

Short courses

The IASS organized and sponsored 6 short courses on the occasion of the Berlin session:

- Workshop on Survey Sampling, presented by Graham Kalton and Steve Heeringa;
- Variance estimation in Complex Surveys, presented by Wayne Fuller and Kirk Wolter;
- Small area estimation, presented by Jon N.K. Rao;
- Editing and Imputation of Survey Data, presented by John Kovar and Eric Rancourt;
- Business Survey Methods, presented by David Binder and Mike Hidioglu;
- Designing the Optimal Questionnaire, presented by Edith de Leeuw and Don A. Dillman.

Meetings and Conferences

The IASS participated in some way in various meetings and conferences.

- The Joint Statistical Meeting, organised principally by the American Statistical Association (ASA), New York, August 11-15 2002; the IASS organized one of the guest sessions, which was dedicated to the memory of Leslie Kish and focused on training issues;
- The International Conference on Improving Surveys, Copenhagen, August 25-28, 2002;
- The International Conference on Questionnaire Development, Evaluation and Testing, Charleston, November 14-17, 2002.

IAOS/IASS Joint Conference

The Conference — on "Poverty, Social Exclusion and Development" — which was due to take place in 2004 in Abidjan (Côte d'Ivoire) had to be postponed. In addition, it

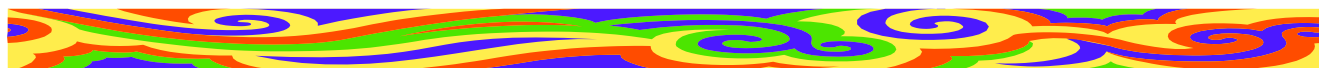
was felt that the scientific programme prepared by the programme committee did not have sufficient international support, in spite of the considerable work achieved by its chairman, Alain Azouvi. Various institutions have been approached for the organisation of the future meeting or have shown interest in it.

Elections

The elections were held early this year as usual. Gordon Brackstone (Canada) is now

President-elect. The two vice-Presidents for 2003-2005 will be Beverley Carlson (USA) and Alvaro Gonzalez-Villalobos (Argentina); the Scientific Secretary will be Marina Signore (Italy). Congratulations to them and to the six Council members elected for 2003-2007. The Association is indebted to Oladejo Ajayi who chaired the Nominations Committee.

Xavier Charoy, President



CHANGE OF ADDRESS

Members are encouraged to inform the IASS Secretariat of changes of address as soon as possible. Mailings of the proceedings of the IASS papers presented at the ISI sessions, and "The Survey Statistician" will be delayed and may be lost if the Secretariat does not have your correct address.

You may notify Ms. Claude Olivier of your change of address by completing and mailing the Change of Address form given at the end of this newsletter. Alternatively, you can provide the same information to Ms. Olivier by email to claudes.olivier@insee.fr.



Editor's Note

This issue of the Survey Statistician will arrive in your mailbox at the start of the 2004 new year, a year in which the IASS and its worldwide membership will continue to be deeply involved in professional support, development and training for new and ongoing national, regional and international programs of survey research. At its August 2003 meeting in Berlin, the IASS Council appointed me to serve as the new editor of the Survey Statistician, succeeding Leyla Mohadjer who has filled the editor's role admirably for the past four years. I look forward to serving our organization in this role and working with you to maintain the Survey Statistician as a vehicle for exchanging both scientific and administrative news and ideas among the IASS membership.

To prepare for our new duties, Eric Rancourt (the new IASS website editor) and I joined the August 2003 IASS Council meeting to discuss the coordinated activities of the Survey Statistician and the IASS website as tools for disseminating information to the IASS membership, promoting regular scientific interaction among the international membership and educating younger statisticians and practitioners on topics in survey statistics and methods. It was clear from this discussion that IASS members do not all share the same opinion on what the Survey Statistician should be. By and large, these differences in opinions are minor ones and should be expected in any organization as large and diverse as the IASS. During the coming years, I encourage you to continue your critique of the content and organization of the Survey Statistician, sending your comments directly to me or to a member of the IASS council.

This January 2004 issue marks the return of the former Question and Answers column edited by Leslie Kish until his death in 2000. The column is now labeled "Ask the Experts" and will be edited by Anders Christianson anders.christianson@telia.com. In this issue, Anders describes his ideas for the new column and puts out a call for specific questions or topics that you would like to see addressed. Please take a moment to e-mail Anders with any existing questions or suggestions that you have.

The "Software Review" column is a valuable educational component of the Survey Statistician; however, we need your suggestions on programs or systems that should be included in future reviews. To diversify our coverage in this column, we are particularly interested in suggestions to review programs and systems that have been developed outside the US or that address aspects of the survey process other than statistical analysis and variance estimation. If you have a software package that you would like to see reviewed, contact Jim Lepkowski, the review editor, at jimlep@umich.edu.

I would like to comment on plans for using the Internet for distribution of the Survey Statistician and transforming this biannual newsletter to a more "real time," web-based tool for distribution of information to the IASS membership. French and English language versions of the Survey Statistician will continue to be posted to the IASS web site. There has been a suggestion to move the Survey Statistician to an exclusively electronic mode of distribution (e.g., e-mail, Web). The IASS Council discussed this possibility in its August 2003 meeting but lacked needed data on the proportion of IASS members who could only receive the Survey Statistician in print form. With upcoming enhancements to the IASS membership data base (see the President's report in this issue), I expect the issue of electronic dissemination of the Survey Statistician to again come before the Council. Meanwhile, Anders Christianson, Eric Rancourt and I will continue to explore ways to better integrate the content of the Survey Statistician with on-line resources available through the IASS website.

Sincerely,

Steve Heeringa, Editor

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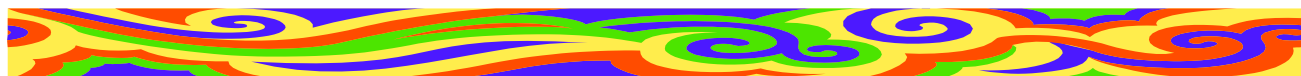
SOFTWARE REVIEW



Software reviews over the last several years have presented summaries of the features of a number of systems or components of systems that deal directly with survey estimation issues, particularly sampling error and weighting procedures. They have addressed such systems as EpiInfo, Wesvar, SUDAAN, SAS sampling error PROCedures, Stata, IVEware, and software for generalized regression weighting. Some of this software is available for free over the internet, and others require payment of a licensing fee.

We are considering additional reviews, and we would like to get reader advice about software that has not been reviewed to date, or for updated reviews on some software. We also would like to hear from you about whether there are software systems that address other survey sampling issues that you'd like us to review. Please keep in mind that we review only software that is available for purchase or for free download. We do not review proprietary or other software that our readers cannot purchase or access through a download.

Please send your advice and ideas to Jim Lepkowski, the review editor, at jimlep@umich.edu.



Country Reports



BOSNIA AND HERZEGOVINA

Edin Sabanovic

Following the end of the war in Bosnia and Herzegovina (B&H) in 1995, the first national household survey attempted was a World Bank sponsored Living Standards Measurement Survey (LSMS), carried out in 2001. This was achieved by carrying out a complete enumeration of households in a sample of 25 municipalities (out of around 150 in the country) and using that as a sampling frame from which 5,400 households were selected for inclusion in the survey.

A sub-sample of around 3,000 LSMS households was subsequently selected to form the basis of a panel survey, known as "Living in B&H." Wave 2 interviews were carried out in autumn 2002, with a successful re-interview rate of about 92%. Wave 3 interviews took place in autumn 2003.

The LSMS sampling frame has limited geographical coverage and has also become out-of-date in a country where population movements and new housing construction are considerable. Consequently, a new approach to sampling for general population surveys has been developed by the B&H statistical institutes in collaboration with consultant Peter Lynn of the University of Essex, UK, with funding from the UK Department for International Development. This has involved creating a comprehensive frame of very small areas (average 70 households), mainly based upon the boundaries of 1991 Census enumeration areas. The frame includes some basic auxiliary information. A sample of these small areas will be selected independently for each planned survey and a semi-intrusive field listing of inhabited dwellings undertaken, prior to random selection of households. A field test of the sampling procedures was

undertaken with success in spring 2003 in a sample of 50 small areas.

The sampling method will be used on a Eurostat-compliant Household Budget Survey to be undertaken over 12 months starting in November 2003, funded by the Italian Statistical Institute (ISTAT). There are also plans for a Labour Force Survey to be implemented as soon as possible. Data collection for all of the mentioned surveys is undertaken by the Statistical Institute of the Federation of Bosnia and Herzegovina (SIFB&H) and the Republika Srpska Institute for Statistics (RSIS), under the co-ordination of the Agency for Statistics of the State of Bosnia and Herzegovina (ASB&H). Further information can be obtained from Edin Sabanovic (edin.sabanovic@bhas.ba).

CANADA

John Kovar

Statistics Canada has published a guide to survey planning, design and implementation entitled **Survey Methods and Practices**. It is a practical guide to common survey taking situations and designs. It explains basic survey concepts and how to build efficient and high quality surveys. The primary purpose of the manual will be to serve as a basic tool for Statistics Canada's Survey Skills Development Course. It will also serve as a set of guidelines and reference document for planning, conducting or managing a survey. It will complement formal university training in statistics or related fields.

Specifically, this book explains: how to formulate survey objectives and design a questionnaire; what to consider when designing a survey (choosing between a sample or a census, defining the survey

population, which survey frame to use, possible sources of survey error), how to determine the sample size, allocate the sample across strata and select the sample; data analysis, including the appropriate use of survey data and methods of point and variance estimation; data dissemination and disclosure control; the use of administrative data particularly during the design phase and at estimation; how to choose between different collection methods (self-enumeration, personal interview or telephone interview; computer-assisted versus paper based questionnaires) and how to organise and conduct data collection operations; data processing (all data handling activities between collection and estimation) along with methods of quality control and quality assurance to minimise and control errors during various survey steps; and how to plan and manage a survey. This publication includes a fictitious survey designed to illustrate the steps in the development of a general household survey, according to the methods and principles presented in the corresponding chapters of the book.

Survey Methods and Practices originated as part of the Canada – China Statistical Co-operation Program, funded by the Canadian International Development Agency. The manual developed for that program was designed to assist the National Bureau of Statistics of China with its national statistical training program. Reaction to the manual was very favourable - from the National Bureau of Statistics and within Statistics Canada. It was felt to be a valuable reference and training document which may well be unique. Therefore, it was decided to review and modify the China manual to produce an official Statistics Canada publication for use in Canada as well as in other countries.

It will be available in English and French for any of the survey related courses and workshops delivered internally or externally by Statistics Canada, and for its new staff. It will also be available for sale to the public at <http://dissemination.statcan.ca/english/IPS/Data/12-587-XPE.htm>.

For more information contact Richard Burgess at (613) 951-1488 (richard.burgess@statcan.ca)

or Charlene Walker at (613) 951-6276 (charlene.walker@statcan.ca).

HUNGARY

Laszlo Mihalyffy

The majority of monthly and quarterly time series of the Hungarian Central Statistical Office (HCSO) are based on sample surveys. In the first quarter of 2002 a new, unified methodology concerning seasonal adjustment of time series was introduced within the HCSO. This methodology uses the TRAMO-SEATS Arima-model based method; the computations are done with the Demetra software. The experts of the Statistical Sampling and Methodology Section of the HCSO co-operating with the data producer departments to fix the model, its parameters and the numerical value of the regression variables for the working day and Easter effect once a year. The departments use these settings for the seasonal adjustment during the year. An important feature of the methodology is the fact that adjusted series are revised at every publication. For further details please contact Peter Bauer (peter.bauer@office.ksh.hu) or Erika Foldesi (erika.foldesi@office.ksh.hu).

ITALY

Claudio Quintano

The survey of graduates in the upper secondary school is subject to a new data collection process. One of the tasks of National Statistical Offices is to exploit administrative data, transforming them into viable statistical information. At the same time, it is imperative to minimize the statistical burden on the various organizations from which data are to be collected. In this regard, new technologies and the spreading of Internet can help, both from the collector and the supplier side.

In the field of analysis of transition from school to work, Istat (Italian national statistical office) carries out a set of 3 surveys, addressed to those who have completed upper secondary

school (diplomati), short university courses (diplomati universitari) and long university courses (laureati), three years before the interview. As for the first survey, the sample design includes a first step (sample of clusters of schools) and a second step (extraction of the sample of graduates to interview).

The schools identified in the first step are requested to send the complete list of those who graduated three years before, extracting information from their administrative registers. In the previous editions of the survey, this preliminary step was conducted sending to each school in the sample a letter with the specimen of the module to fill in. In order to ease the task for the schools, they were asked to fill in the form only for a sample of graduates, to be extracted in a systematic way from the complete list.

This solution presented some drawbacks: the consistency of information in every paper form had to be checked *ex post*, and some corrections had to be made calling back the school; the selection of the sample was delegated to the schools, which had to follow instructions very carefully.

Starting from this experience, a different strategy was adopted for the new edition of the survey, planned in 2003 (data collection from the school) and 2004 (field interviews of the graduates): to ask to each school for the complete list of graduates, and to organize an electronic exchange of data from the schools to Istat.

The new collection system is implemented on a web platform. Each school received a user-id and a password to enter an application in a web site at the address <http://diplomati.istat.it>. Once signed-in, the school had the opportunity to fill in an electronic questionnaire or to upload data from a standard format file. For both choices, data were checked on-line and, if completely consistent and correct, they were entered into a data base at Istat service centre.

The web site is based on Internet technology and includes two main components: A centralised web server, and a browser installed on the clients' stations. In particular, the Web Server is located in an exposed

Unix/AX machine, i.e., accessible from outside the Istat network in observance of the security regulations adopted by the Institute to maintain integrity and confidentiality of data. The application architecture is client/server, which allows lower occupation of the internet connection, speeding up the collection operation and the sending of the form.

A three-layer architecture has been created, as follows:

1. The client, which can be a simple PC with an Internet connection and which connects via a Netscape or Explorer browser to the ad hoc site.
2. The web server, which is Apache, where the HTML and JAVA servlets are located.
3. The DBMS ORACLE server, which is used to store data.

This innovation in the process of data collection guaranteed an improvement in quality and timeliness of data, and a diminution of statistical burden for respondents. For more information please contact Maria Pia Sorvillo (Istat, Social Institutions Direction, sorvillo@istat.it), or Marina Venturi (Istat, Social Institutions Direction, venturi@istat.it).

New Zealand

Robert Templeton

Statistics New Zealand has recently completed development of a longitudinal household survey which will run for 8 years. The **Survey of Family, Income and Employment** (SoFIE) collects information about income, family relationships, employment, assets and liabilities, education and health. Fieldwork for the first wave began in October 2002. The development phase, which began in July 1997, included a feasibility study, extensive consultations and two pilot surveys. The sample was designed to meet a wide range of users' interests, with an expected sample size of approximately 10,000 responding households in the first wave. This assumes a response rate of around 80%, which looks likely to be exceeded with wave 1 nearly complete. The sample size spans 12 months for a single wave of data collection, in order to smooth

interviewer workload and to take data seasonality into account. We also use a Computer Assisted Interviewing (CAI) system data collection mode to collect information from respondents. Development of methods is complete for the respondent tracking system, estimation, editing, imputation, and variance estimation procedures for SoFIE and development of the processing system is underway. At the end of September 2003 we will have completed the first wave's data collection and will test the SoFIE processing system with wave 1 data. The first data release is planned for the middle of 2004. For additional information, contact Paul Satherley, (Paul.Satherley@stats.govt.nz 64-4-931-4356).

Statistics New Zealand is undertaking several data integration projects using existing administrative data as an alternative to collecting data from additional surveys. First, we have created a new statistical information source on **student loan borrowers** by integrating, at the unit-record level, administrative data from three government agencies, including study-related variables, loan-related information and tax-related information. The primary goal of the student loans project is to provide previously unavailable statistical information on student loan borrowers. The project will assist with forecasting, reporting of the asset in the government accounts, understanding the cost of the scheme to the government, costing policy changes and assessing the socio-economic impact of, and the return on, education. A combination of exact linking and statistical linking techniques were used to integrate the data. The first output of the integrated dataset was published in December 2002 and focused on the amount borrowed and loan balance in 2000 by student characteristics such as sex, age, ethnicity, level and field of study and provider type. The integrated dataset will be updated annually as each year's administrative data becomes available. For additional information, contact Anne Spellerberg (Anne.Spellerberg@stats.govt.nz 64-4-931-4318)

Secondly, the **Linked Employer Employee Dataset** (LEED) project aims to provide new insights into business performance and the operation of the labour market by bringing together information about employers and

their business' performance with data about employees. New official statistics derived from this data will inform a range of public policy issues. The project draws on existing, full coverage, administrative data from the Inland Revenue Department's Employer Monthly Schedule and business information from Statistics New Zealand's Business Frame. Stage one of the project involves using three years worth of monthly data (beginning in April 1999) to test the feasibility of establishing this dataset in New Zealand. Should the project proceed beyond the current investigatory stage, there is potential to provide a range of new official statistics (e.g., job flows and worker flows), improve existing official statistics (e.g., business demography, multiple job holding and individual earnings) and also produce outputs at a finer level that would feed into official derived statistics such as the National Accounts. For additional information, contact Andrew Hunter (Andrew.Hunter@stats.govt.nz 64-4-931-8355).

PHILLIPINES

Gervacio G. Selda, Jr.

The Philippine National Statistics Office (PNSO) with the assistance from the Asian Development Bank (ADB TA 3656-PHI: Improving Poverty Monitoring Systems) has recently come up with a redesigned master sample for its household surveys. The new master sample called **2003 Master Sample for Household Surveys** was presented in a User's Forum held last June 10, 2003 in Mandaluyong City, Metro Manila. The redesigning of master sample was undertaken with the following as its objectives:

- i) update the population structure using the results of the 2002 Census of Population and Housing;
- ii) reflect in the sample design the new geographic reconfiguration of the Philippines;
- iii) ensure that enough samples are available to cover the intercensal survey requirements until 2012; and
- iv) incorporate lessons learned from old designs in order to make the new design more effective.

Beginning June 2003, the new master sample will be used in the following intercensal surveys: Labor Force Survey (LFS), Family Income and Expenditure Survey (FIES), Survey of Overseas Filipinos (SOF), Annual Poverty Indicator Survey (APIS), Functional Literacy and Mass Media Survey (FLEMMS), Family Planning Survey (FPS), Maternal and Child Health Survey (MCHS), Survey of Children 5-17 (SOC), and National Demographic and Health Survey (NDHS). In the new master sample, households in the least accessible barangays and in areas with peace and order problems are excluded. In general, these excluded barangays account for only 3.43% of the total number of barangays in the country. Through this new frame, the PNSO expects to promote cost-effectiveness in the conduct of its surveys, provides substantive as well as operational linkage between surveys, and facilitate, as well as restrict and control the drawing of multiple samples for various surveys. To be incorporated in the newly developed master sample are the following activities:

- i) improvement of public use files through incorporation of design variables;
- ii) development and maintenance of files for further analytic uses; and
- iii) regular updating of the list of households.

For more information on the 2003 Master Sample for Household Surveys, contact: Administrator Carmelita N. Ericta, Philippine National Statistics Office, at C.Ericta@mail.census.gov.ph

POLAND

Janusz Wywiał

Survey of the Household Time Budget in Poland is being developed by the Central Statistical Office between June 2003 and May 2004. The main purpose of the survey is the estimation of the mean duration of several personal activities per day. Activities such as work, sleep, study, and meal preparation are considered. The parameters will be estimated in the sub-populations determined by days of a week and demographic or sociological

characteristics including age, sex, and education.

The population of households was partitioned into 251 strata. A stratum is a large town, a cluster of small towns, or a farm area. Two stage samples were drawn from the strata. Each stratum was partitioned into clusters consisting of about 800 households. These clusters are the first stage units. The households are the second stage units. The samples are selected without replacement in both stages. The first stage units are selected with the probabilities proportional to their sizes (number of households). At the second stage all samples are simple random samples. Ten households were drawn from each previously selected unit of the first stage. Nine of these ten units are treated as reserve units. One work day and one weekend day are randomly assigned to each household in the sample. More details can be obtained from B. Lednicki, B.Lednicki@stat.gov.pl.

SPAIN

Montserrat Herrador

A special sensibility is arising in the European Union about the statistical harmonisation in order to provide the possibility of comparing survey data among surveys and, of course, among countries. All these harmonising processes include the creation of international classifications and the development of common methodologies. On the other hand, new computer technologies are providing a broader and faster information interchange as well as an increase in the information demanded by users, so a better knowledge of the data (and subsequently of the metadata) is needed.

Consequently international organizations are carrying out several projects focused on **metadata research** aimed at statistical harmonisation, projects such as those undertaken by the Statistical Office of European Union (EUROSTAT), the International Monetary Fund (IMF) or the Organisation for Economic Co-operation and Development (OECD). Most of the countries are very interested in these projects and are

therefore very active in research projects that concentrate their attention on the inputs.

Along these lines, the Spanish National Statistical Institute (INE) is currently carrying out a research project called NOMENPAC whose main objective is to build a tool in order to facilitate the integration and co-ordination of all the information requested by INE from the data providers. Generally speaking, the NOMENPAC project will allow INE to produce information that is more harmonised, rationalised, and, especially, more comparable. As well, data users will thus have available a tool to obtain more information about every statistical operation performed by INE. Moreover, in the future, this project will favour the co-ordination among the different actors of the Spanish Statistical System (INE, Ministerial Departments, Regional Statistical Offices, Spanish Central Bank, and others).

A database has been created which contains the questions from all of the questionnaires. Its main elements are: concepts, variables (in most cases, coinciding with the questions), lists (non-standardised classifications) and classifications. This information is managed by an ORACLE database, which can be

accessed by means of the Intranet. The access system of the database works through menus in order to guide the search of information performed by users as well as to connect with other projects developed by INE avoiding duplication of tasks.

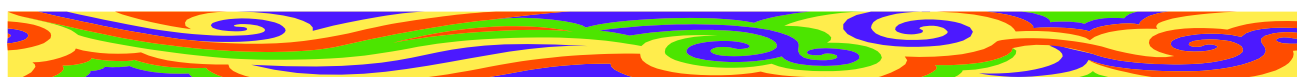
The database is structured with two different working approaches in mind, as follows:

1. In the context of a Statistical Operation, variables are analysed according to associated lists and classifications.
2. A thematic classification of variables (which has been specifically created) exists, so as to obtain in an easy manner, comprehensive information for a specific subject requested by INE.

In conclusion, this system has allowed for the organisation of the information requested by INE, in a way that makes the link of each Statistics Operation with the other Statistics Operation and with the different subjects of interest easy for the users. For further information, please contact Montserrat Herrador (herrador@ine.es).

To All Members

- ◆ The IASS needs your contribution.
- ◆ Please do not forget to renew your membership.
- ◆ As of January 2002, French Francs are no longer accepted. As a consequence, the payment of dues and subscriptions must be made in either Euros or U.S. dollars.



ASK THE EXPERTS

Anders Christianson

During the Berlin ISI meeting an IASS administrative meeting was devoted to the subject "The Survey Statistician" and the web site." One issue that was brought up was to create a follow-up to Leslie Kish's "Questions and Answers" column that so regrettably was interrupted by Leslie's death.

The new column should be named "Ask the Experts" and take advantage of the vast amount of knowledge that exists among our members, particularly the senior ones. Whereas Kish's column predominantly covered sampling issues, this new column should cover the whole range of survey methodology and related issues that students and junior survey statisticians show an interest in. It should also take advantage of the web site to provide prompt responses to the questions posed, with samples of questions and answers published also in the "Survey Statistician." I was appointed to coordinate this column; an assignment that I am very honored to receive. I am also glad to interact with the webmaster, Eric Rancourt, and the editor of the "Survey Statistician," Steven Heeringa, in this matter.

However, to become successful, this project needs cooperation from many IASS members. We need questions from survey statisticians and we also need help from experts to answer them.

The process will be that the questions are first sent to me (preferably to my e-mail address, see below). I will then consult Steven and Eric to appoint an expert and ask this expert to give an answer to the question. The question and answer will be published on the website shortly after their completion. We will have one category "Current Issues" for the most recent issues. After a while, when new ones appear, they will be moved to other categories under their proper headings, like Frames and Registers, Sampling, Data Collection and

Response Quality, Editing, Estimation, Dissemination, etc. Thus questions and answers will accumulate on the website, hopefully covering many different aspects of survey methodology. If the project becomes successful, which we all hope, there may be a printed version that can be sent out to all members.

So, this is an appeal to all of you to take part in this project by providing interesting questions and well considered answers.

anders.christianson@telia.com

Editor's note: To stimulate new ideas for the "Ask the Experts" column, a historical example from Leslie Kish's Questions and Answers column is reprinted here. Please note Anders Christianson's point that questions should not be limited to statistical design, estimation and inference but can be drawn from the full range of problems encountered in survey practice.

Q/A 24.1 Truncate, Censor, Trim, and Winsorize

Q: The terms *truncate*, *censor*, *trim*, and *Winsorize*, among others, seem to be used interchangeably and confusedly in referring to the handling of "outliers" in study data. What do you recommend as to their usage in survey data? (Contributed by Prof. Lawrence H. Moulton, Biostatistics Dept., SPH, University of Michigan 48106)

A: You are correct in that many of these terms are rather loosely bandied about. The first thing to recognize is that they fall into two distinct classes: (1) *truncation* and *censoring* are characteristics of the study *design*, determining whether values of certain

variables would be known to or used by the investigator; (2) *trimming* and *Winsorization* are statistical analysis techniques that one applies (as a transformation) to a set of data once it has been collected.

Data are referred to as *truncated* when they are sampled from a conditional distribution, so that the total number of data points is unknown. For example, if one were trying to estimate the mean length of fish in a pond, but only fish of a certain minimum length could be caught in a net to be measured, the population would be said to be *truncated*. In the sample survey context, characteristics of units may cause them to be outside the sampling frame, and hence their response values *truncated*, as in a survey of “business establishments with at least ten full-time employees.” This may be viewed as lack of coverage of the sampling frame.

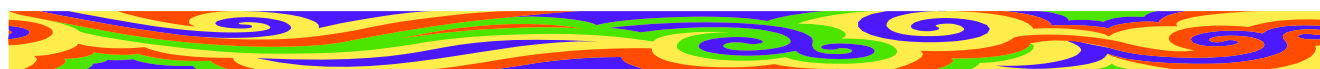
Censoring, on the other hand, occurs when a respondent has been identified, but the precise value of their response value is unknown because it has exceeded or failed to exceed a given value. This is common, for example, in estimation of lifetime distributions, where an individual’s exact survival time may be *censored* by loss to follow-up or by living past the end of the study period.

The term “outlier” often refers to a value which is so extreme compared to the rest of the data that it may well be considered as having emanated from a distribution different from the one under investigation. Thus, data may be “contaminated” by outliers. Ways this can happen include inclusion error, as when a millionaire is included in a sample of supposed public aid recipients, or from erroneous data, resulting from digit transposition, deception, etc. However, “outliers” may also represent extreme values

from skewed distributions (e.g., incomes of millions or billions), which are excluded (beyond some stated limit) because they would unduly increase variances and especially variances of variances. *Trimming* or *Winsorizing* the data can yield an analysis that is robust to the assumption of “no contamination by outliers” that is often made. A *trimmed* analysis results from analyzing the data which remains after throwing out a certain proportion of the smallest and largest data values, while a *Winsorized* analysis proceeds by first replacing the most extreme values by the closest order statistics. For example, the 20% *trimmed mean* of the data: 35, 51, 52, 56, 98 is calculated as: $(51+52+56)/3 = 53$, while the corresponding *Winsorized mean* replaces 35 by 51 and 98 by 56 to get: $(51+51+52+56+56)/5 = 53.2$. Asymmetric application of these methods also may be appropriate. *Trimming* generally is preferred to *Winsorizing* because of the latter’s over-dependence on the particular values of the next most extreme values, 51 and 56 in the preceding example.

In the sample survey setting, if one is interested in a mean of a variable, and it is acknowledged that error or contamination of the data may be present, trimming the data can be highly efficient. However, in many survey settings it is possible to return to verify the data, in which case it may be preferable to allocate resources to routinely check, say, the largest and/or smallest 5% of the observations.

Editor’s note: *Curtailing* is also used; *shrinking* and *transformations* may also be considered alternative methods for treating these problems. For references see the new Wiley *Encyclopedia of Statistics* and the new Longman’s *Dictionary of Statistical Terms* by F.H.C. Marriott.



Editor's note: The following two articles were submitted in response to the discussion of substitution in survey samples that has appeared in the previous two issues of the Survey Statistician.

The Use of Substitution in Surveys

Peter Lynn
University of Essex

The two stimulating articles on substitution in issue 48 of "The Survey Statistician" (Chapman, 2003; Vehovar, 2003) have raised some important issues. I run a one-week course on "Dealing with Non-Response," funded by the EU and targeted at government statisticians in Europe. The course has run five times between 2000 and 2003, attracting a total of 92 participants. Each participant is asked to provide a written summary of his or her organisation's experiences with non-response and to make an oral presentation. Checking through these summaries, I find that about one-third describe some form of substitution. The surveys in which substitution is used are carried out by 15 different organisations in 13 different countries: 10 of these are national statistics institutes. Substitution is often a hot topic of discussion on the course. In addition to this evidence, some high-profile international surveys, such as the World Bank's Living Standards Measurement Survey (LSMS) series, also use substitution. Substitution is therefore alive and well and discussion of its merits is warranted.

Types of Substitution

My first observation is to endorse the point made by Vehovar (2003) that there are many varieties of substitution. It is not helpful to attempt to make general statements about the properties of substitution. I would like to extend Vehovar's taxonomy. I suggest that a substitution method can be classified by its status on three dimensions:

1. Whether the *decision* to substitute a unit is made by the interviewer or by the office (I use "the office" as a proxy for any process of which the interviewer is unaware);
2. Whether the *selection* is made by the interviewer or the office;
3. *How* the selection is made: here I distinguish three broad categories: simple random, stratified random, non-random.

There are thus 12 possible types of substitution designs. However, I believe that cases where interviewers are asked to make a strictly random selection are rare: I have been unable to find any examples. That leaves 8 types, illustrated in Figure 1.

Vehovar refers to "interviewer influenced substitutions." These can be seen to be of five types, depending on whether the interviewer has influence over the decision to substitute, the selection of the substitute unit, or both, and on the method of selection. Of these, type 1 is arguably the worst, in terms of researcher control over sample composition. Many surveys use this type of substitution, though they vary greatly in the extent to which the interviewer decisions are constrained, for example by rules about how many contact attempts must be made before a non-contact can be substituted, or by rules regarding the selection of the substitute.

Types 5-8 avoid one of the major criticisms of types 1-4, as the interviewer need not be aware that substitution is being used (the instruction to make extra selection(s) or the provision of extra selection(s) can be presented as a need to increase the sample size) and this therefore need not influence his/her behaviour with regard to the initial sample of units. To achieve these benefits, however, the method needs careful design and implementation. Types 2-4 are perhaps less common and tend to be used on face-to-face surveys with very short field work periods, for which types 6-8 are ruled out. Vehovar's "management generated substitutions" consist of my types 6-8, and his example of fully automated Mitofsky-Waksberg two-stage procedures is a type 8 method.

Figure 1. Eight types of substitution

Decision:	Interviewer		Office	
Selection:	Interviewer	Office	Interviewer	Office
Method:	1. <i>Non-random</i>	2. <i>Non-random</i> 3. <i>Simple random</i> 4. <i>Strat random</i>	5. <i>Non-random</i>	6. <i>Non-random</i> 7. <i>Simple random</i> 8. <i>Strat random</i>

Stratified Random Substitution

The distinction between types 7 and 8 (and between 3 and 4) is important. Good stratification can improve the match between the substituted and substitute units. This relates to Chapman's (2003) concern that a "specially designated" (i.e., purposively selected) substitute may be preferable to a random one, even within strata. I would suggest that this can only be the case if the stratification is suboptimal. If you can purposively select a unit that matches on six frame variables, for example, then I concede that this could be (though is not necessarily) "closer" in relevant respects to the substituted unit than a substitute selected at random from a stratum defined by only three of the variables. But why not create a substitution stratum defined by all six variables? Surely that would be better still? It could be argued that this remains a probability sample. And there is no need for the substitution strata to be the same as the pre-strata (cf. post-stratification)

It may be argued that even stratified random substitution constitutes a departure from random sampling, as selection probabilities are conditional upon the response propensities of the initial sample cases. But is this really so different from using differing initial sampling fractions across strata in anticipation of variation in response rates? In that case, the selection probabilities are conditional upon the response propensities of units in previous survey samples, as it is variation in response rates to those surveys that have led us to expect the same again.

Perhaps the potential difference lies in the way that the substituted units are treated. If they remain in the sample and are treated as non-respondents, perhaps surveys using

substitutions of types 7 and 8 can be considered as valid probability samples, akin to Kish's (1965) "supplement samples." In this case, it would of course be necessary to know both the pre-strata and substitution-strata membership of all sample units (both original sample and substitutes) in order to calculate selection probabilities. However, this is not usually done. Usually, the substituted units are removed from the sample and the substitutes are treated as if they were original sample members (this is what the word "substitute" implies). Perhaps it is this unnecessary step that should be discouraged?

Interviewer Awareness

An important issue is the risk that the mere existence of substitution as a strategy - regardless of which type of substitution is done - can influence interviewer behaviour and, specifically, discourage them from extended efforts to achieve response with initial sample units (Elliot, 1993). If substitution types 7 and 8 are to be useful, I would suggest that they must be implemented in a way which leaves the interviewers completely unaware that substitution is taking place. This is easy to achieve on centralised CATI surveys but more of a challenge on some other surveys.

Parallels with Imputation

Finally, there are some parallels between stratified substitution and imputation. With stratified substitution, we essentially impute an entire record for a unit non-respondent. The donor pool consists of all non-sampled units in the stratum. Maybe we can draw upon what is known about the properties of imputation methods to understand better the properties of stratified substitution.

References

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Substitution in the Hungarian HSB

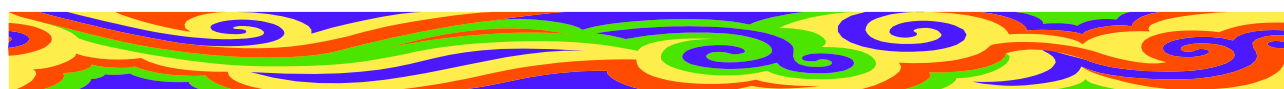
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Hungarian Central Statistical Office

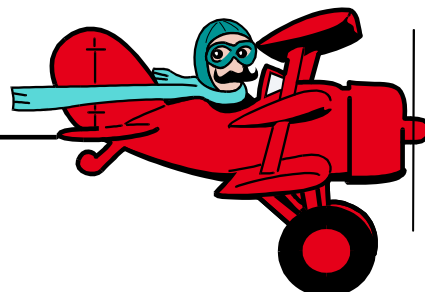
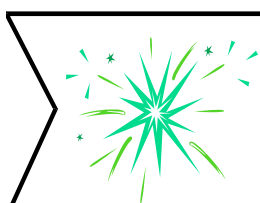
From among the household surveys carried out by the HCSO field substitution is applied essentially in the Household Budget Survey only. This is a continuous survey covering about 10,000 households in a year. The sample is selected in three stages in the case of the non self-representing communities—these being the primary sampling units—while in two stages in self-representing communities (with inhabitants exceeding 20,000). In the latter case the census enumeration districts (EDs) are the primary

sampling units. Both communities and EDs are selected with probability proportional to size (measured by the number of dwellings), while in the last stage an equal number of addresses are selected with equal probability from the sample districts. Households are requested to record their incomes and expenditures daily through one month.

The non-response rate and within it the rate of refusals are rather high, especially in certain social groups. Therefore without allowing field substitution not only the size of the realised sample would be considerably lower than planned, but the sample would be so seriously biased that it could not be appropriately corrected by reweighting or calibration. That is why in case of failure at the primary address the country directorate of the CSO gives a substitution address by phone to the interviewer where the household belongs to the same social stratum as the non-responding household living at the primary address. The characteristics used for stratification of the households in the frame originate either from the census when a new sample is used for the first time, or from a preliminary survey of all households in the sample EDs carried out biannually subsequently. In the course of these biannual surveys a few basic demographic and activity data are collected from the households such as the size of the household, the age, economic activity, profession and highest educational attainment of the reference person. Thus the substitute household has in several respects the same characteristics as that living in the primary address and that way the substitution does not increase the potential bias caused by non-response.

Only *one* substitute address is allowed for every primary address, except in Budapest and in the largest towns where a second substitute is given in case the first one proves non-responding, too.





REPORTS

Report of the Scientific Secretary

Seppo Laaksonen

IASS Scientific Secretary (2001-2003)

The main duties of the IASS Scientific Secretary are associated with the short courses offered at the time of the ISI meetings. Other activities of the Scientific Secretary are associated with the IASS co-sponsorship of other conferences, occasionally being the point of contact for the association.

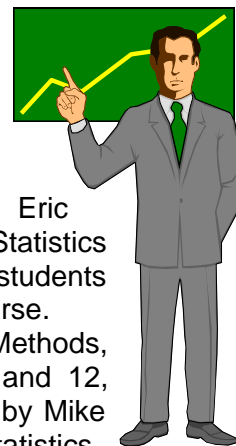
IASS Short Courses

Arrangement of short courses also relating to a conference with the IASS sponsorship was discussed but no attempt could be realized. Maybe this can happen in the future. This being the case, we followed the traditions and the IASS sponsored five short courses prior to the 2003 ISI meetings, and one course after the ISI session:

- A. Workshop on Survey Sampling, held on August 9, 10 and 11, 2003, and presented by Graham Kalton (Westat) and Steven Heeringa (The Statistical Design Unit at the Survey Research Center, University of Michigan); 37 students registered for the course.
- B. Variance Estimation in Complex Surveys, held on August 12 and 13, 2003, and presented by Wayne Fuller (Iowa State University), Kirk Wolter (NORC), F. Jay Breidt (Iowa State University), and Anthony An (SAS Institute); 28 students registered for the course.
- C. Introduction to Small Area Estimation, held on August 12 and 13, 2003 and presented by J.N.K. Rao (Carleton University); 33 students registered for the course.
- D. Editing and Imputation of Survey Data, held on August 21 and 22, 2003 and presented by John G. Kovar (Statistics

Canada) and Eric Rancourt (Statistics Canada); 34 students registered for the course.

- E. Business Survey Methods, held on August 11 and 12, 2003 and presented by Mike Hidioglou (Statistics Canada) and David Binder (Statistics Canada); 30 students registered for the course.
- F. Designing the Optimal Questionnaire, held on August 12 and 13, 2003 and presented by Edith de Leeuw (Methodika/Utrecht University, The Netherlands) and Don Dillman (The Social and Economic Sciences Research Center, Washington State University); 34 students registered for the course.



Most participants registered for one course, but many for two courses and a few for three courses. The number of different registrants was 155.

The courses were held in four different venues, one in Potsdam and the other three in Berlin. The venues were as follows:

- Land Office for Data Processing and Statistics of Brandenburg (Potsdam) for courses B and D,
- Land Statistical Office Berlin for courses A and C,
- Berlin School of Economics for course E, and
- German Institute for Economic Research for course F.

The course organization was started during the ISI Seoul conference by interviewing the former scientific secretary, Daniel Kasprzyk, and four course instructors, i.e., Graham Kalton, John Kovar, Jon Rao and Wayne Fuller. Two months after the conference the first email letter was sent to the Berlin conference organizers. They answered later and informed us that Professor Peter T. Wilrich could act as the contact person for these

courses. Later he was replaced by Lars Wittmann from Statistisches Bundesamt, Wiesbaden. Thanks to the conference organizers for their fine support, including offering the venues without charge for the courses.

In early 2002, an email conference with the IASS council was arranged in order to get good ideas for the topics of short courses, although one idea was to arrange several of the same courses as earlier. Our first list contained nine courses (also including "Calibration techniques," "Complex survey analysis" and "Longitudinal survey data analysis"), but after the discussion, the above-mentioned six courses were chosen. This number is higher than in earlier conferences, but we considered this to be realistic, especially because it was naturally possible to cancel a course due to a small number of registrants.

The first advertisements were published both on the ISI conference website and in the first conference bulletin. These announcements also informed about the preliminary dates and course venues. Since some dates were not ideal for the courses, the necessary changes were made. The final announcement with course fees included was ready for advertisement in late autumn 2002. The announcement was published in English (not in French as earlier) in all the possible forums, including the "Survey Statistician," the "ISI Newsletter" (for unknown reasons the announcement was missing from the spring 2003 newsletter), the Berlin conference website and the second conference bulletin, the IASS website (quite late due to website update problems), the IMPUTE discussion forum, several other discussion forums, the EU and other project homepages and networks. Also, a high number of individual emails was submitted including two emails to the local IASS representatives by Vice-President Anders Christianson. It was requested from the people contacted to forward the announcement further by email, and hence it is difficult to say in which forums the announcement was available.

The budget was prepared using previous experiences. Correspondingly, the course rates were established, and expenses were

estimated. The rates were somewhat lower than in Seoul for developed country participants. A group discount was used the first time; this was exploited by six institutes.

Books for courses A and B were acquired for distribution to the registered students. Significant discounts on the price of the books were obtained by Graham Kalton and Kirk Wolter (Springer and Wiley). All bills were sent to the Scientific Secretary for payment.

Class notes were prepared by the instructors. Kovar and Rancourt made the necessary copies for course D and shipped them to Potsdam. Eustat – the Basque Statistical Office – sent without charge 35 copies of Rao's publication in their series for course C. The other two papers for his course were copied by the Scientific Secretary at Statistics Finland and submitted to Potsdam without charge. The copies of course E (Business survey methods) were copied without charge by the Berlin School of Economics (BSE). The BSE also supported by arranging refreshments and social events for the course. Thanks to Statistics Canada, Eustat, Statistics Finland and the BSE for their support for the courses. Many other copies were made by the course venues and the instructors themselves. Thanks to all who contributed to these affairs. The class notes, papers and other material were distributed to the participants of the short courses.

The registered applicants came from the following countries (56): Finland, India, Malaysia, Argentina, Belgium, Netherlands, Germany (5), Brazil, Korea, Philippines (10), Gambia, New Caledonia, Nigeria, Armenia, Fiji, United Kingdom, United States, Sweden (9), Australia, Norway, New Zealand, Iran, Latvia, Mexico, Canada, Nepal, Hungary, China, Poland, Lithuania (12), Croatia, Slovenia, Portugal, Romania (9), Spain, Indonesia, Italy, Bulgaria, Tajikistan, Côte d'Ivoire, Lesotho, Pakistan, Ukraine, Czech Republic, France, Thailand, Saudi Arabia, Japan, Turkey, Mauritius, Luxembourg, Denmark, Greece, Uganda, Guatemala and Columbia. The number of registered applicants from Germany, the host country, was relatively low (compared to the numbers in the previous sessions) although the courses were advertised widely in the country.

The United Nations Statistics Division sponsored travel grants to the ISI meetings and the short courses. Statisticians employed by National Statistics Offices whose countries are members of the United Nations and are considered transition or developing countries are eligible to be considered for travel grants. The UN Statistics Division sponsored 20 such grants for the short courses at the Berlin meetings. Thanks are due to the United Nations Statistics Division for their gracious generosity in support of the short courses. The ISI Development fund gave one travel grant to the courses and the ISI meetings. Thanks to the ISI Development fund for their support. The IASS supported the travel of the Cochran-Hansen Award recipient (**Krishna Mohan Palipudi, India**) to attend the ISI meetings and the short courses.

The European Union (managed by Eurostat Unit A5) put the training courses on their list. The list was sent out to the 13 candidate countries. It covers all the meetings in Eurostat and other events (e.g., meetings organized by the ECE, and now the IASS courses) for which the candidate countries can use the Phare budget to cover the costs of their participation. This option was exploited by several European transition countries and together by 37 registrants. Many thanks to Eurostat for this support.

Thanks are also due to the local German organizers in four different venues, in addition to the main office in Wiesbaden. At least, the following persons have to be mentioned:

Courses A and C: Roland Schlösser and Jörg Höhne

Courses B and D: Arend Steenken, Katharina Schütz, Antje Günther and Nils Bremke

Course E: Helmut Maier and Birgit Wiese.

Course F: Reiner Staeglin.

Thanks are due to the short course instructors and their employers for the time given to preparing course outlines, lecture notes and course materials. Instructors receive no remuneration and are only compensated for the expenses incurred during the days on which the short courses were given. Outstanding instructors are a key element of the success of the short courses. The IASS is grateful for their willingness to teach these

courses. Thanks also to Statistics Finland for the good facilities of the Scientific Secretary (electronic forms were used as much as possible but there was also much need to make prints, to take copies, and to send a high number of mailed letters and faxes for communication, invitations, invoices, receipts, etc.).

A social event was arranged during each course, the main purpose being to give the participants and instructors the opportunity to meet each other informally. Various types of events were arranged, including a reception in a venue place and a visit to a neighborhood restaurant. In Potsdam, two walking tours to the Sansouci park were arranged with the guidance of Katharina Schütz and Nils Bremke. Great thanks to them. Photos were taken in each course, and a high number of these were submitted to participants in electronic form. Evaluation forms and certificates of course completion were prepared; and badges for names were provided. The evaluation reports were prepared and submitted to the instructors and the new scientific secretary Marina Signore.

Names of the new IASS members due to the IASS short course registration were sent to the IASS office (30 registrants). The financial statement was prepared and submitted to the IASS.

A confusing point was that the ISI organized without discussing with the IASS its own short courses on the same topic "Survey Methodology" in Berlin and advertised these better than the IASS courses. Not all the ISI courses were held and hence some of these registrants made a late registration to our courses.

IASS Sponsorship of Conferences

The IASS has co-sponsored a number of conferences over the last two years:

- The DataClean 2002 Conference, held in Jyväskylä, Finland, May 29-31, 2002, organized by the University of Jyväskylä, the EU/Euredit project and the Finnish Statistical Society with the sponsorship of the IASS (<http://erin.it.jyu.fi/dataclean/>). The conference was chaired by Pasi

Koikkalainen, the number of participants was about 120.

- Baltic-Nordic Conference on Survey Sampling, held in Ammarnäs, Lapland, Sweden, August 17-23, 2002, organized by the Department of Mathematical Statistics of the University of Umeå with the sponsorship of the IASS (<http://www.matstat.umu.se/banocoss>). The conference was chaired by Gunnar Kulldorf, about 80 participants attended, many outside Nordic and Baltic countries.
- International Conference on Improving Surveys (ICIS), held August 25-28, 2002 in Copenhagen. Hans Bay from the National Institute of Social Research (hb@sfi.dk) chaired the program. The IASS, The Survey Research Methods Section of the ASA and Eurostat, among others, sponsored the conference. About 250 participants attended the conference. People who did not attend ICIS but who are interested in buying the CD should look at the website www.icis.dk. Prior to the conference courses in "Analyzing Sample Survey Data using SAS", ECHP (European Communities Household Panel Survey), and SUDAAN were given.
- Third Francophone Conference on Sampling, held October 17-18, 2002, in Grenoble, France (sondages2002.upmf-grenoble.fr). The conference was chaired by Bernard Denni and was organized/sponsored by several societies including *Société Française de Statistique (SFdS)* and the IASS.
- International Conference on Questionnaire Development, Evaluation, and Testing was held November 13-17, 2002, Charleston, South Carolina, USA (www.jpsm.umd.edu/qdet). The official sponsors were the American Statistical Association, Survey Research Methods Section, the American Association for Public Opinion Research, the International Association of Survey Statisticians (contributing \$5,000 to support the conference) and the Council of American Survey Research Organizations. In addition to the sponsorship of those four

professional organizations, there were also 22 research organizations that provided financial support. There were 338 conference attendees.

- The joint IAOS/IASS conference on "Poverty, Social Exclusion and Development" has been under planning. Earlier the intention was to arrange it in Abidjan (Côte d'Ivoire) in 2004, but currently the year 2004 and Jordan are discussed.

August 29, 2003



Report of the Nominations Committee of IASS, 2001-2003 O. O. Ajayi

Introduction

1. During the 53rd session of the International Statistical Institute (ISI) held in Seoul, South Korea, the President of the IASS appointed O.O. Ajayi to chair the nominations committee. Other members were subsequently identified in later months. The identified members were:

- | | | |
|-------|------------------|-----------------|
| (i) | Jacques Charmes | (France) |
| (ii) | Daniel Kasprzyk | (USA) |
| (iii) | Janis Lapins | (Latvia) |
| (iv) | Diana Masone | (USA) |
| (v) | Alice Odounfa | (Cote d'Ivoire) |
| (vi) | Claudio Quintano | (Italy) |
| (vii) | Awa Thiongane | (Senegal) |

Three of these members never responded nor participated in the exercise. This situation could have been due to "non-contact" or to unwillingness on their part to be a committee member.

2. The President gave a detailed briefing to the chair which included aspects of the statutes and constraints that bind the elections,

previous experiences and suggestions on the procedures. The committee also benefited from the President in his follow-up actions. The committee would like to express its appreciation for the President's support.

The actual work of the committee started in August 2002. It involved the following:

- (I) Committee members to make suggestions for nominations for each of the posts (President, Vice President, Scientific Secretary and six Council members) representing geographic and gender balance with the stipulation that there be no more than two elected officers from the same country or same federation of countries.
- (II) Ranking of all suggested names to identify the appropriate number of candidates for each office and for the council.
- (III) Acceptance by nominated members.
- (IV) Election process.

3. The stages (I)—(III) were to have been concluded by December 2002 but could not be completed until January 2003. It was in fact with the strong support of the secretariat that stage III was completed. The election process took place from early February 2003. In all we had the following number of nominations for the offices and council: -

President	—	six names
Vice President	—	five names
Scientific Secretary	—	four names
Council	—	nineteen names

4. Problems Encountered

- (a) As indicated above, three of the committee members never responded in spite of several emails to them; perhaps due to out-dated directory of members including their addresses.
- (b) Those committee members who participated did so under very great pressure with some of them on missions abroad and having to attend to the assignment with great difficulties. This certainly slowed down the pace of work.

- (c) The committee also experienced late/delayed replies from nominated members for their acceptance/non-acceptance to run.

5. In spite of these challenges, the election process was concluded and the following officers and council members have been elected: -

President

G. Brackstone (Canada)

Vice Presidents

B. Carlson (USA)
A. Gonzalez-Villalobos (Argentina)

Scientific Secretary

M. Signore (Italy)

Council Members (2003-2007)

P. Ardilly (France)
J-J. Driesbeke (Belgium)
G. Ferrari (Italy)
L. Hewitt (Trinidad & Tobago)
N. Keita (Mali)
H. Som (Cambodia)

6. Suggestions for the Future

- (i) The directory should be up to date for this exercise, particularly the email addresses and the currency of members.
- (ii) The complete committee might be established during the ISI session so as to enable the committee to meet once or twice when more than 50% of the work could be completed. This will shorten the long writing-time for committee members to respond to aspects of the assignment.

7. Conclusion

The chair of the nomination committee would like to place on record the assistance given to him by IASS President, Xavier Charoy for his regular nudging, the secretariat of the IASS for their support and heavy secretariat duties in reaching some of the candidates, and the entire membership of the committee for their help. He appreciates the assistance and the opportunity to serve.

Report of the Executive Director

**ALAIN CHARRAUD, Executive Director,
With François FABRE, Treasurer**

This report deals with the executive secretariat activities from 2001 to 2003, between the Congress of Seoul and this one.

During this period, the secretariat lost his former executive director, Christophe Lefranc, who left for Africa for a statistical Cooperation mission.

I accepted, one year ago, to take over his position temporarily, until now. A few weeks ago, I proposed to President Charoy that M. Michel Péronnet, the director of INSEE Center (CEFIL) in Libourne, be our new Executive Director. Michel Péronnet is a statistician and a manager, he chairs the CEFIL, where the IASS Secretariat is located, and he is aware of international affairs. Moreover he participated in the design of the new computerized application just set up to manage the membership database.

The other members of the Secretariat are Mrs Anna Maria Vespa and Claude Olivier, who go on with their tasks. They have to be warmly thanked for having helped me to assume all the daily tasks of the secretariat.

As it is well known, the IASS receives facilities from INSEE: personnel, current secretariat expenditures, travel fees, etc. When we met him, in July, the General Director of INSEE renewed his support for our Association.

The Membership

On the first of July, the directory file contained 1075 active members, with the following breakdown:

725 A: 505 men, 216 women, 4 undeclared
286 B: 286 men, 35 women, 15 undeclared
25 C: 18 men, 7 women
39 Institutional or special members

It clearly appears that this number of active members is very close to the one of 2001 (1066 units) and 1999 (1151 units). The proportion of OECD countries members is

also exactly the same: two thirds (713 active members).

Between the different geographical areas, we have the following distribution :

Europe	429
Asia	158
Africa	152
America	287
Oceania	49

The two main countries are always USA (172 members) and France (133), followed by Italy (63), Canada (35), Australia (30), Sweden (25), Korea (24), Germany (22), Spain (19), Japan (19), New Zealand (13) and Netherlands (13).

Review subscriptions

"The Survey Statistician" or "Le Statisticien d'enquêtes" and the ISI Newsletter are sent to all active members. But these latter can also subscribe to other reviews at a reduced rate.

Thus, in 2002, 238 subscriptions were paid :

51	Journal of Official Statistics
77	International Statistical Review
20	Short Book Review
90	Survey Methodology or "Techniques d'enquêtes"

Elections

The Secretariat has carried out the elections for the new council 2003-2005:

Elected President: Gordon Brackstone
(*Canada*)

Vice-Presidents:
Beverley Carlson (*USA*)
Alvaro Gonzalez Villalobos (*Argentina*)

Scientific Secretary:
Marina Signore (*Italy*)

New Council Members:
Pascal Ardilly (*France*)
Jean Jacques Driesbecke (*Belgium*)
Guido Ferrari (*Italy*)
Linda Hewitt (*Trinidad and Tobago*)
Naman Keita (*Mali*)
Hiek Sorn (*Cambodia*)

During the period 2003-2005 the new president will be Luigi Biggeri, elected in 2001. He takes over from Xavier Charoy.

The members elected in 2001 will stay in the council until 2005 :

Kari Djerf (*Finland*)
David Fitch (*Guatemala*)
Lidija Oligorova (*Croatia*)
Lang Hui Huang (*China*)
Moshe Sicron (*Israel*)
Awa Thiongane (*Senegal*)

Accounts (see table)

M. François FABRE, our treasurer, prepared the 2001 and 2002 accounts (see tables inside). He also set up a provisional account for 2003.

The 2001 account registers a fall in membership contributions. The sponsoring ex-

penditures mainly concern short courses in Seoul and summer courses in Napoli. The income from short courses subventions are recognized in 2002 only.

The 2002 account registers a membership contributions growth. Important incomes result from short courses and conferences sponsoring: 2001 Seoul short courses, 2000 Jubilee conference sponsoring with ASA.

At the beginning of 2003, we registered three important financial movements:

- ① Income from sponsoring of ICES 1998 Conference (15,320 US \$)
- ② Income from sponsoring of International Conference on survey non response (13,852 US \$)
- ③ Expenditure for printing and mailing the Leslie Kish volume from John Wiley (31,295 US \$).

Berlin, August 2003

TABLEAU 1 — IASS Financial Report

	2001 in F.	2001 in €	2002 in €
INCOME			
Membership contributions			
Individuals	45 364,01	6 915,70 €	11 274,62 €
Institutional	55 640,15	8 482,29 €	4 217,00 €
Publications	35 956,89	5 481,59 €	7 627,01 €
Courses, conferences and royalties	0,00	0,00 €	22 739,58 €
Interest	2 727,47	415,80 €	415,80 €
Others	0,00	0,00 €	0,00 €
Total	139 688,52	21 295,38 €	46 274,00 €
EXPENDITURE			
Publications	40 890,15	6 233,66 €	7 290,56 €
Secretariat costs	9 636,76	1 469,11 €	1 135,95 €
Travel and meetings			
ISI Session	59 844,71	9 123,27 €	0,00 €
Others	8 564,17	1 305,60 €	699,53 €
Computer and bank costs	7 375,26	1 124,35 €	3 356,46 €
Sponsorship of Conferences, courses	82 694,51	12 606,70 €	0,00 €
Cochran-Hansen Prize	29 204,03	4 452,13 €	0,00 €
Others	3 536,53	539,14 €	729,94 €
Total	241 746,12	36 853,96 €	13 212,44 €
Fund 31 December n - 1	587 641,48	89 585,37 €	76 230,82 €
Income over Expenditure	-102 057,59	-15 558,58 €	33 061,56 €
Securities value and change variation	14 457,73	2 204,03 €	-3 752,41 €
Fund 31 December n	500 041,62	76 230,82 €	105 538,97 €

Announcements

Philippines **First Research-based Regional Course**

The United Nations-Statistical Institute for Asia and the Pacific (UN-SIAP) will sponsor a research-based training program in collaboration with the Statistical Research and Training Center (SRTC) and the Philippine National Statistical Office (PNSO). The training program entitled **First Research-based Regional Course** will be held on February 16—March 26, 2004 in Metro Manila, Philippines. This program will provide an additional training modality for middle and senior government statisticians of national statistics offices in the ESCAP region (excluding Australia, Japan, New Zealand and Philippines) with the objectives of raising their capability in undertaking independent research in official statistics and preparing quality statistical reports. There are two phases under the training program. Phase 1 is a 6-week training course focused on lectures and practicum on basics of research principles and methods. Improvements on the proposal submitted by the participants during the application process and the preparation of a draft research paper will also be tackled. These activities will be done under the supervision of a research adviser assigned to the participant by SRTC. Phase 2 will be a post-course assignment where the participants will be required to finalize their research papers within one month after return to their home countries. The training program is open to all middle-level or senior statisticians with the government who are nominated by their respective national statistical offices. SIAP has set the deadline for receipt of completed nominations to 28 November 2003.

The Philippine Statistical System (PSS) spearheaded by the National Statistical Coordination Board (NSCB), and in cooperation with various stakeholders of poverty statistics, is organizing the **2004 International Conference on Official Poverty Statistics: Methodology and Comparability** to be held in Manila, Philippines on October 4-6, 2004.

The Conference will be conducted simultaneously with the 9th National Convention on Statistics, a triennial event conducted by the PSS. The twin events will be the highlights of the nationwide observance of the National Statistics Month in the Philippines in October 2004. For more information, contact Dr. Romulo A. Virola, Secretary-General of NSCB at ncs@nscb.gov.ph.

United States **Nominations Sought for Waksberg Paper**

The journal *Survey Methodology* has established an annual invited paper series in honor of Joseph Waksberg, who has made many important contributions to survey methodology. Each year a prominent survey researcher is chosen to author an article as part of the Waksberg Invited Paper Series. The paper reviews the development and current state of a significant topic within the field of survey methodology, and reflects the mixture of theory and practice that characterizes Waksberg's work. The author receives a cash award made possible by a grant from Westat, in recognition of Joe Waksberg's contributions during his many years of association with Westat. The grant is administered financially by the American Statistical Association. Previous winners were Gad Nathan, Wayne Fuller, Tim Holt, and Norman Bradburn. The first three papers in the series have already appeared in *Survey Methodology*.

The author of the 2005 Waksberg paper will be selected by a four-person committee appointed by *Survey Methodology*. The American Statistical Association. Nominations of individuals to be considered as authors or suggestions for topics should be sent to the chair of the committee: Mike Brick, Westat, 1650 Research Blvd, Rockville MD 20850 USA, by email to mikebrick@westat.com, or by fax 1-301-294-2034. Nominations and suggestions for topics must be received by December 12, 2003.



University of Southampton **New Developments in Statistical Disclosure Control**

The Southampton Statistical Sciences Research Institute (S³RI) is hosting a one day symposium on NEW DEVELOPMENTS IN STATISTICAL DISCLOSURE CONTROL on 7 May, 2004. The meeting will consist of 4 expert lectures delivered by Steve Fienberg, Jon Forster, Chris Skinner and Yosef Rinott, followed by discussion and questions. Registration fee for the symposium is £25, which includes lunch and refreshments. For further details, contact Danny Pfeiffermann; email: msdanny@socsci.soton.ac.uk, Fax: 972-2-5883549. To register, contact Jane Schofield; email: jms1@socsci.soton.ac.uk, Fax: 44-23-80-594800

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www.isi-iass.org

	<p>International Association of Survey Statisticians (IASS) The Premier World Organization representing who's who in Sample Survey and Census Methodologies</p>
<p>More about the IASS</p> <p>Becoming a member</p> <p>Services for members</p> <p>Survey Statistician</p> <p>Publications</p> <p>IASS Conferences</p> <p>Cochran-Hansen Prize</p> <p>Ask the experts</p> <p>Links</p> <p>What's new</p>	<p>FOUNDATION AND OBJECTIVES:</p> <p>Founded in 1973, the International Association of Survey Statisticians (IASS) has as its charge and mandate to promote the study and development of the theory and practice of sample surveys and censuses. It also aims to increase interest in surveys and censuses among statisticians, governments, and the public the world over.</p> <p>MEMBERSHIP AND EXECUTIVE:</p> <p>At present the IASS has approximately 1.200 members from 130 countries and 38 institutional members.</p> <p>IASS headquarters are situated in Libourne (FRANCE) and operate, to a large extent, under the auspices of the French statistical agency INSEE, which lends its expertise and status to aid and promote the association's work.</p> <p>The society is run by an Executive Committee, elected for a period of 2 year and a Council, elected for a four year period.</p> <p>Anyone interested in learning more about IASS should contact Christophe Lefranc IASS Executive Director INSEE 18, Bd. Adolphe Pinard 75675 PARIS, France e-mail: christophe.lefranc@insee.fr</p>
	<p>Association Internationale des Statisticiens d'Enquête (AISE)</p>

Important Notices

- ◆ A PDF file of the newsletter is available on the IASS web site. Currently, very few members prefer only to be notified when a new issue is posted, instead of receiving the hard copy. At this point we do not have a process in place to support this option. A process will be developed when an adequate number of members choose the above. Until that time, all members will continue to receive hard copies of the newsletter.
- ◆ Members are encouraged to view the IASS website (www.isi-iass.org) and provide comments or suggestions to Eric Rancourt: eric.rancourt@statcan.ca.

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**A Journal Published
by Statistics Canada**

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Journal of Official Statistics

An International Review Published
by Statistics Sweden

An International Review Published by Statistics Sweden

JOS is a scholarly quarterly that specializes in statistical methodology and applications. Survey methodology and other issues pertinent to the production of statistics at national offices and other statistical organizations are emphasized. All manuscripts are rigorously reviewed by independent referees and members of the Editorial Board.

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**An International Review Published
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The Allgemeines Statistisches Archiv (ASTA), Journal of the German Statistical Society is edited by Prof. Dr. Karl Mosler, University of Cologne. It provides an international forum for researchers and users from all branches of statistics. The first part (Articles) contains contributions to statistical theory, methods, and applications. A focus is on statistical problems that arise in the analysis of economic and social phenomena. The second part (News & Reports) consists of news, reports, and other material that relates to the activities of the Society. Book reviews are published in the third part (Books). Invited papers which have been presented to the Annual Congress of the Society are regularly published in the second issue of a volume. All papers in the first part are anonymously refereed. In order to be acceptable, a paper must either present a novel methodological approach or a result, obtained by a substantial use of statistical method, which has a significant scientific or societal impact. Occasional review papers are also encouraged. Authors of contributions are requested to mail three copies to the editor for refereeing. The journal publishes original contributions in English and German language, articles preferably in English. After acceptance the author has to provide a LaTeX- or ASCII file of the final manuscript that follows the style of the Allgemeines Statistisches Archiv in citation and layout. For submissions, please contact:

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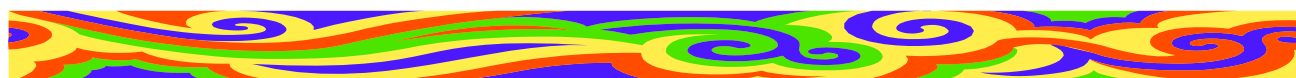
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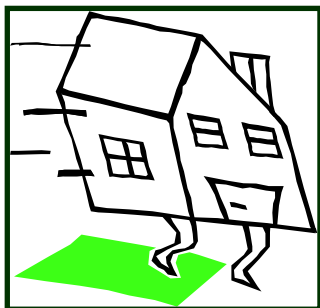
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INTERNATIONAL ASSOCIATION OF SURVEY STATISTICIANS

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USA - DEPARTMENT OF HEALTH AND HUMAN SERVICES

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