

I. ABOUT THE DATA

A. OBJECTIVE/S OF THE STUDY

The 2003/2004 BLES Integrated Survey (BITS) aims to generate an integrated data set on employment, industrial relations practices and occupational injuries and diseases.

B. MAIN TOPICS COVERED BY THE SURVEY

Main topics covered by the survey are employment of specific groups of workers; establishment practices on balancing work and family life, flexible work arrangements, job-related training provided to employees, mechanisms for workers' participation in decision making process; and occupational injuries and diseases.

C. USES OF THE DATA

As inputs to studies on industry trends and practices and serve as basis for formulation of policies and programs on employment, industrial relations, and safety and health at the workplace.

D. REFERENCE PERIOD

The reference periods for the 2003/2004 BITS are as follows:

- General Information---June 30, 2004 and CY 2003
- Employment---June 30, 2004
- Industrial Relations Practices--- Calendar Year 2003
- Occupational Injuries and Diseases---Calendar Year 2003

E. PERIODICITY (FREQUENCY)

Every 2 years

F. COVERAGE OF THE SURVEY

Geographical: The whole country.

Industrial: Non-agricultural industries except national postal activities, central banking, public administration and defense and compulsory social security, public education services, public medical, dental and other health services, activities of membership organizations and extra territorial organizations and bodies.

Establishments: Non-agricultural establishments employing 20 persons or more.

Persons: All employed persons.

G. CONCEPTS AND DEFINITIONS

Establishment - an economic unit engaged in one or predominantly one kind of economic activity under a single ownership or control at a single fixed location, e.g. mine, factory, store, bank, restaurant. For multi-unit enterprises with different outlets and subsidiaries or whose activities are located at different locations, each branch, outlet or subsidiary is considered an establishment. For firms engaged in activities which may be physically dispersed such as mining, construction, real estate development, transportation, communication, insurance, etc., the establishment is the base from which personnel operate to carry out their activities or from which they are paid.

Employment - refers to persons who worked or received pay from the establishment. This includes:

Working Owners without Regular Pay;

Unpaid Workers - apprentices and learners without regular pay and persons without regular pay who work for at least one-third of the working time normal to the establishment; and

Employees - categorized into:

- *Managers and Executives* - workers whose main responsibilities are to determine and formulate policies and plan, direct, control and coordinate the activities of enterprises and organizations, or their internal departments or sections. Working owners receiving regular pay are included;
- *Supervisors/Foremen* - workers whose main responsibilities are to plan, direct, organize and supervise the daily activities of workers in the section or unit concerned with the production of goods or the provision of services, subject to the general directive of managers; and
- *Rank and File Workers* - those who do not fall within the managerial or supervisory classification of employees. These consist of:
 - i. *Regular Workers* - those hired to perform activities which are usually necessary or desirable in the usual business or trade of the employer and usually worked on permanent status; and
 - ii. *Non-Regular Workers* - consist of:
 - *Probationary Workers* - those on trial period during which the employer determines their fitness to qualify for regular employment, based on reasonable standards made known to them at the time of engagement;
 - *Casual Workers* - those whose work is not usually necessary and desirable to the usual business or trade of the employer. Their employment is not for a specific undertaking or seasonal in nature;

- **Contractual/Project-based Workers** - those whose employment has been fixed for a specific project or undertaking, the completion or termination of which has been determined at the time of engagement. Agency-hired workers are excluded.
- **Seasonal Workers** - those whose employment, specifically its timing and duration, is significantly influenced by seasonal factors; and
- **Paid Apprentices/Learners** - those who are covered by written apprenticeship/learnership agreements with individual employers or any of the entities with duly recognized programs. Apprentices/learners without regular pay are excluded.

Total Employment includes persons on paid vacation, sick, maternity, paternity, service incentive leave and other paid leaves, persons working away from the establishment but paid by and under its control and workers on strike. It excludes silent or inactive partners, members of the board of directors paid solely for attendance at meetings, workers on indefinite leave, laid off workers for six (6) months or more, persons **purely on commission** and without employer control, consultants, persons on retainer basis, contract out/agency hired workers and homeworkers.

Workers Paid the Minimum Wage - workers who are paid the applicable minimum wage rates fixed by the Regional Tripartite Wages and Productivity Boards.

Persons with Disabilities - workers suffering from restriction or different disabilities, as a result of mental, physical or sensory impairment, to perform an activity in the manner or within the range considered normal for a human being.

Time-rate Workers - those paid on the basis of a time unit of work such as an hour, a day or a month.

Part-time Workers - those who work at jobs which provide less than the working time normal to the establishment.

Piece-rate Workers - those who are paid on the basis of the number of units produced rather than on the time spent in production.

Production Standard (Quota) Workers - those whose performance is measured based on an imposed minimum amount or quantity of production for a given period, usually 8 hours.

Pakyao” or “Takay” Workers - those whose job or work to be performed is in bulk or volumes which are difficult to quantify (commonly practiced in the agricultural industry).

Task Workers - those who are paid for performing specific work irrespective of the time consumed.

Workers with Basic Pay and Commission - those working for the establishment who receive a basic pay plus a certain percentage of money received for a transaction. They are on the regular payroll of the establishment and are included in its total employment. (Example: sales representatives).

Purely on Commission with Employer Control and Supervision - those working for the establishment who are paid purely on the basis of a certain percentage of money received for a transaction. They are under employer control and supervision and are on the regular payroll of the establishment, and are included in its total employment. (Example: bus drivers in transport operation).

Purely on Commission without Employer Control - those working for the establishment who are paid purely on the basis of a certain percentage of money received for a transaction. They are outside employer control and are not on the regular payroll of the establishment, and are excluded in its total employment. (Example: insurance underwriters).

Workers who Work on Shifts - those who work on work schedules, whether successive or overlapping, within a 12-hour or 24-hour day of work.

Contracting - an arrangement whereby a principal agrees to put out or farm out with a contractor or subcontractor the performance or completion of a specific job, work or service within a definite or pre-determined period regardless of whether such job is to be performed or completed within or outside the premises of the principal.

Agency-hired Workers - those hired through agencies/contractors to perform or complete a job, work or service within the premises of the establishment. They are excluded from the total employment of the establishment.

Compressed Workweek - an arrangement where a worker observes the normal weekly hours of work by prolonging his/her daily working hours but shortening his/her workweek. For instance, an employee may work for 10 hours a day for four days a week instead of eight (8) hours a day for five (5) days a week to comply with the 40-hour workweek.

Sliding Flexible Work Schedule (Flexi time) - an arrangement where an employee works at least eight (8) hours each working day but may start and quit work at his/her convenient time provided that this does not disrupt the daily operation and delivery of service of the establishment.

On-call - an arrangement where a worker is on standby and is only called when needed to do a job, and is only paid for the hours worked.

Teleworking - an arrangement where an employee (teleworker) is allowed to work at home. A teleworker is different from a homemaker as he/she has greater control over his/her skills, and means of production and labor. Teleworkers often network; the popular practice is for them to work in their local vicinity and communicate with their establishment located elsewhere.

Job-sharing - an arrangement where two (2) or more employees share one job. This arrangement is resorted to rather than cutting down on workforce. The employees would rather cut their wages and work time.

Career Breaks - an arrangement where an employee is allowed to go on a long term leave, similar to an extended leave, e.g., as long as three to six months.

Job-related Training - includes courses, workshops and training programs, where acquired knowledge is needed for the job or it helps the performance of the tasks and duties of the job. It excludes training on topics of personal interest if unrelated to the job.

Occupational Accident - refers to an unexpected and unplanned occurrence including acts of violence arising out of or in connection with work (work-related event or a single instantaneous exposure in the work environment) which results in one or more workers incurring a personal injury, disease or death. It can occur outside the usual workplace/premises of the establishment while the worker is on business on behalf of his/her employer, i.e., in another establishment or while on transport or in road traffic.

Occupational Injury - refers to any personal injury, disease or death resulting from an occupational accident. It is distinct from an occupational disease, which is contracted as a result of an exposure over a period of time to risk factors such as contact with asbestos, lead, inhaling cotton dust, carrying out repetitive movement arising from work activity.

Where more than one person is injured in a single accident, each case of occupational injury is counted separately. If one person is injured in more than one occupational accident during the reference period, each case of injury to that person is counted separately. A recurring absence due to an injury resulting from a previous occupational accident is treated as the continuation of the same case of occupational injury not as a new case.

Fatal Case - refers to a person fatally injured as a result of occupational accident whether death occurs immediately after the accident or within the same reference year as the accident.

Permanent Incapacity - case where an injured person was absent from work for at least one day, excluding the day of the accident, and 1.) was never able to perform again the normal duties of the job or position occupied at the time of the occupational accident, or 2.) will be able to perform the same job but his/her total absence from work is expected to exceed a year starting the day after the accident.

Temporary Incapacity - case where an injured person was absent from work for at least one day, excluding the day of the accident, and 1.) was able to perform again the normal duties of the job or position occupied at the time of the occupational accident or 2.) will be able to perform the same job but his/her total absence from work is expected not to exceed a year starting the day after the accident, or 3.) did not return to the same job but the reason for changing the

job is not related to his/her inability to perform the job at the time of the occupational accident.

Case Without Lost Workdays - case where the injured person required only first aid or medical treatment on the day of the accident and was able to perform again, on the day after the accident, the normal duties of the job or position occupied at the time of the occupational accident.

Lost Workdays - refer to working days (consecutive or staggered) an injured person was absent from work, starting the day after the accident. If the person is still absent from work by the end of the reference year, his/her days lost cover the period from the day after the accident up to the end of the reference year. Temporary absences from work of less than one day for medical treatment are not included in days lost.

Hours Actually Worked - include normal/regular hours of work; overtime; time spent at the place of work such as the preparation of workplace, repairs, maintenance, preparation and cleaning of tools, preparation of receipts, time sheets and reports; time spent at the place of work waiting or standing by for reasons such as lack of supply of work, breakdown of machinery or accident, or time during which no work is done but for which payment is made; time corresponding to lunch/meal breaks of less than one hour and to short rest periods at the workplace including tea and coffee breaks/meriendas; it exclude hours paid for but not worked due to vacation, sick, maternity, paternity, service incentive leave and other paid leaves, rest days, special days and regular holidays, lunch/meal breaks of one hour or more and time spent on travel from home to workplace and vice versa.

Frequency Rate - cases of occupational injuries with lost workdays including fatalities per 1,000,000 employee-hours of exposure.

Incidence Rate - cases of occupational injuries with lost workdays including fatalities per 1,000 workers.

Severity Rate - lost workdays of cases of occupational injuries resulting to temporary incapacity per 1,000,000 employee-hours of exposure.

Average Days Lost - lost workdays of cases of occupational injuries resulting to temporary incapacity per case of occupational injury.

H. UNIT OF MEASUREMENT

- Numbers and percentages for employment and industrial relations practices.
- Numbers and rates for occupational injuries.

I. CLASSIFICATIONS

Geographic: The geographic classification is based on the 2002 Philippine Standard Geographic Classification (PSGC).

Industrial: The industry classification is based on the 1994 Philippine Standard Industrial Classification (PSIC). It was patterned after the International Standard Industrial Classification (ISIC), Rev. 3 of the United Nations, up to the 4-digit level, but with modifications to suit national situations and circumstances.

Employment Size: The classification of establishments according to employment size is based on the average total employment, e.g., 20-99, 100-199 and 200 and over.

Others:

- Employment according to types of workers and employees according to specific groups
- Industrial relations practices according to establishment characteristics such as ownership, spread of operations, market orientation, unionized or with collective bargaining agreement.
- Cases of occupational injuries according to incapacity for work (fatal, permanent, temporary)

J. SAMPLING DESIGN

Statistical unit: The establishment is the statistical or enumeration unit. Each unit is classified in an industry that reflects its main economic activity---the activity that contributes the biggest or major portion of the gross income or revenues of the establishment.

Survey universe/Sample frame: The sampling frame used for the survey was taken from the List of Establishments of the National Statistics Office. On a partial basis, this is regularly updated based on the responses to other surveys of the BLES, establishment reports on retrenchments and closures submitted to the Regional Offices of the Department of Labor and Employment and other establishment lists.

Sample design: Establishments in the sampling frame were stratified by 3-digit industry (domain) and by employment size (stratum), i.e., 20-99, 100-199 and 200 and over. However, industries observed to be heterogeneous within their 3-digit classification were further broken down at the 4-digit level. Geographical location was not considered in the stratification to allow for detailed industry groupings.

Based on past experiences and accounting for resource availability, total sample size has been estimated at around 7,000. For the 2003/2004 BITS, establishments employing at least 100 workers were covered with certainty as their employment represents about 60 per cent of total employment in non-agricultural establishments employing at least 20 workers. These establishments, however, comprise only 11 percent of the reference establishment population.

The sample sizes for the industry groups in the non-certainty stratum (20 - 99) were derived as follows:

Step 1: $n_{20-99} = 6,500 - (n_{100-199} + n_{\geq 200})$

where n_{20-99} is the residual sample size after excluding the sample sizes of the certainty strata from 6,500 (*Note: the desired sample size of around 7,000 includes the built-in replacement samples.*)

Step 2: $n_{20-99,k} = (n_{20-99} \times N_{20-99,k}/N_{20-99})$

The sample sizes of the industry groups (k) falling in the stratum were determined proportional to the establishment population (N) of the stratum.

Step 3: adjusted $n_{20-99,k} = n_{20-99,k}/0.8$

The sample size for each cell (industry group and employment size) was adjusted to build-in replacement, e.g., sample size divided by 0.8 as expected retrieval rate is 80 percent. A minimum of 5 samples per cell is maintained. If the establishment population of the cell is less than 5, all the establishments were taken as sample respondents.

Sample Size: For 2003/2004 BITS, the sample size was 7,191, of which 6,012 were found to be eligible sampling units.

K. FIELD WORK

Data collection: The survey is conducted in coordination with the Regional Offices of the Department of Labor and Employment. On a project basis, employees are hired to personally deliver and retrieve the questionnaires from the establishments. In some instances, questionnaires are mailed to establishments in less accessible or conflict prone areas, in which case a self-addressed envelope is provided. The establishments may also submit the accomplished questionnaires through fax. Delivery of questionnaires starts in July of each year and retrieval will commence after all questionnaires have been delivered or within 10 working days from delivery to an establishment or on a date agreed upon by the contact person and the enumerator. The basic data originate from the payroll, accident and other related records of establishments.

Survey questionnaire: The questionnaire is made up of several parts, i.e.

Cover page - contains the address box for the establishment and other particulars;

Page 2 - provides information on the survey objective and uses of the data, confidentiality clause, collection authority, authorized field personnel, coverage, periodicity and reference periods, due date and availability of results;

Part I General Information - This portion inquires on main economic activity and major products/goods or services of the establishment; average employment and number of employees; regular working hours per day for majority of employees; days actually worked during the year and days not worked but considered paid during the year for majority of employees; establishment characteristics such as ownership (*wholly Filipino, with foreign equity, wholly foreign*), spread of operations (*whether establishment is a multinational*), market orientation

(domestic market only, export only or both), presence of a union and existence of a collective bargaining agreement in the establishment. Union membership and CBA coverage are likewise inquired on;

Part II Employment - This section requires data on total employment and its breakdown into working owners, unpaid workers and employees (managers/executives, supervisors/foremen and rank and file: regular and non-regular workers). It also looks into employment of specific groups of employees, types of jobs contracted out and the number of agency-hired workers;

Part III Industrial Relations Practices - This part inquires on establishment practices on balancing work and family life; flexible work arrangements; job-related training provided to employees; mechanisms for workers' participation in decision making process;

Part IV Occupational Injuries - This inquires on the incidence of occupational accidents; cases of occupational injuries and lost workdays (part of the body injured, cause and agent of injury); occupational diseases; number of commuting accidents and workers injured; and hours actually worked by all employed persons;

Part V: Certification - this box is provided for the respondent's name and signature, position, and telephone/fax numbers and e-mail address; time spent in answering the questionnaire; comments or suggestions (on the data it provided for the survey and improvements on the design/contents of the questionnaire); and

Part VI: Survey Personnel - this portion is allocated for the names of personnel involved in collection, editing and review of each questionnaire and dates when the activities were completed; and

Substitution of sampling units: There is no substitution of sampling units as replacement is built-in.

L. DATA PROCESSING AND EDITING

Data are manually and electronically processed. Upon collection of accomplished questionnaires, enumerators perform field editing before leaving the establishments to ensure completeness, consistency and reasonableness of entries in accordance with the field operations manual. The forms are again checked for data consistency and completeness by their field supervisors. The BLES personnel undertake the final review, coding of information on classifications used, data entry and validation and scrutiny of aggregated results for coherence. Questionnaires with incomplete or inconsistent entries are returned to the establishments for verification, personally or through mail.

Microsoft Access is used for data encoding and generation of validation prooflists. After checking accuracy of encoding based on the prooflists, a conversion program using SPSS is executed to generate output tables.

M. TYPES OF ESTIMATES

- Establishment profile
- Categories of employment and employees
- Establishment practices on balancing work and family life; flexible work arrangements; job-related training provided to employees; mechanisms for workers' participation in decision making process;
- Cases of occupational injuries, frequency and incidence rates of cases of occupational injuries with lost workdays, severity rates and average days lost of cases of occupational injuries resulting to temporary incapacity; occupational diseases and commuting accidents and workers injured

The above data would be available by industry.

N. ESTIMATION/COMPILATION METHODOLOGY

Due to the inadequacy of the frame used, there are reports of permanent closures, duplicate listing and shifts in industry and employment outside the survey coverage. Establishments that fall in these categories are not eligible elements of the frame and their count is not considered in the estimation. In addition to non-response of establishments because of refusals, strikes or temporary closures, there are establishments whose questionnaires contain inconsistent item responses that are not included in the processing as these have not replied to the verification queries by the time output table generation commences. Such establishments are also considered as non-respondents.

Respondents are post-stratified as to industry and employment size classifications. Non-respondents are retained in their classifications.

Estimates are obtained by simple expansion, i.e., by multiplying the sample values at the cell level (industry and employment size: 20-99, 100-199 and 200 or more) by the corresponding blowing-up factor which is the ratio of the eligible population of establishments to the corresponding number of responding establishments.

The estimates are aggregated to the desired levels to arrive at total estimates of the population, e.g. number of minimum wage earners or number of establishments with unions. A population ratio is obtained by dividing total estimate of a variable with the total estimate of another variable, e.g. total lost workdays of cases resulting to temporary incapacity by corresponding number of cases to derive average days lost.

O. ADJUSTMENTS

Non-response: Non-response is taken into account in the weighing procedure.

Other bias: No adjustments are made.

Use of benchmark data: No benchmark data is used.

Use of other surveys: No other survey data are used.

Seasonal variations: Not applicable.

P. INDICATORS OF THE RELIABILITY OF THE ESTIMATES

Coverage of the sampling frame: Partially updated.

Sampling error/sampling variance: Computed for key variables.

Non-response rate: For 2003/2004 BITS, the non-response rate in terms of eligible sampling units is 28 percent.

Non-sampling errors: These may occur due to inaccuracies in reporting by establishments and enumerators, mistakes in coding, editing and data entry. However, efforts are made to reduce non-sampling errors by careful design of the questionnaire, intensive training of survey personnel, linkages with key informants (employers' groups) and through adoption and documentation of efficient operating procedures.

Conformity with other sources: The survey results are checked for consistency with the results of previous BITS data or related administrative data.

Estimates for non-survey years: Not relevant.

Q. HISTORY OF THE SURVEY

Initiated in 2003, the BITS integrates the data requirements on employment, industrial relations, occupational injuries and labor cost that used to be collected by the BLES through independent surveys such as Survey on Specific Groups of Workers (SSGW), Industrial Relations at the Workplace Survey (IRWS), Occupational Injuries Survey (OIS) and Labor Cost Survey (LCS).

This integration aims to reduce respondent burden from filling out various BLES survey questionnaires, to optimize the use of resources and to improve the timeliness of information.

The inquiry on labor cost was included in the 2002/2003 round but not in the 2003/2004 round because the periodicity of the LCS is every 4 years as it deals with structural data. For the 2003/2004 round, however, the inquiry on occupational diseases was added.

R. AVAILABLE SERIES:

The new data series starts with the 2002/2003 BITS. Nevertheless, past data are available from SSGW, IRWS, OIS and LCS.

II. DOCUMENTATION

A. PERIODICITY OF DISSEMINATION

The results are released 14 months after the June reference period of the survey inquiry on employment.

B. ADVANCE RELEASE CALENDAR

An advance release calendar that gives one-quarter-ahead notice of the approximate release date is posted in the BLES Homepage.

C. DISSEMINATION FORMATS

Hard Copy

- LABSTAT Updates
- Philippine Industry Yearbook of Labor Statistics
- Yearbook of Labor Statistics

Electronic

- BLES Homepage: <http://www.bles.dole.gov.ph>; <http://www.manila-online.net/bles>
- Diskette: statistical tables of the BITS
- CD ROM: Philippine Industry Yearbook of Labor Statistics; Yearbook of Labor Statistics

III. CONFIDENTIALITY

The compilation and dissemination of the data are governed by the terms and conditions of Executive Order No. 126 (January 30, 1987) creating the Bureau of Labor and Employment Statistics.

While E.O. 126 is silent on the confidentiality of individual responses from surveys conducted by the BLES, it collects data under the pledge of confidentiality. A statement to this effect is printed in all the questionnaires of BLES surveys.