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Colombia Productiva
Services Statistics Project

Proposal of a training scheme related to the implementation of the quarterly survey on services enterprises

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Contents

Introduction	5
1. The existing training scheme aimed at the surveyors in charge of the annual survey on services enterprises in DANE.....	6
1.1. The public of the existing training scheme	6
1.2. Organisation.....	6
1.3. Content of the training.....	6
1.4. Teaching principles and material used.....	6
2. The proposed training scheme related to the implementation of the quarterly survey on services enterprises : a general presentation.....	7
2.1. The public targeted by the training scheme	7
2.2. The objective of the training scheme	7
2.3. Pedagogic principles.....	7
2.4. Organisation and material used	7
2.5. Time allocated.....	8
2.6. Content of the training scheme	8
3. The proposed training scheme on enterprises economics	8
3.1. Objective of the training on enterprises economics	8
3.2. Content of the training on enterprises economics.....	8
3.3. Detailed content of the proposed training scheme on enterprises economics.....	9
3.3.1. Detailed content of the proposed training on the concepts of enterprise, business and company	9
3.3.2. Detailed content of the proposed training on the economic and legal definitions of the enterprise.....	9
3.3.3. Detailed content of the proposed training on the organisation of the enterprise.....	9
3.3.4. Detailed content of the proposed training on the structure of the enterprise	9
3.3.5. Detailed content of the proposed training on the various production modes	10
3.3.6. Detailed content of the proposed training on the various forms of alliance between enterprises.....	10
3.3.7. Detailed content of the proposed training on the management of the enterprise ..	10
3.3.8. Detailed content of the proposed training on the organisation of the information within the enterprise.....	11
3.3.9. Detailed content of the proposed training on the main accounts of the enterprise	11
3.3.10. Detailed content of the proposed training on the main variables of the other accounts of the enterprise	12
3.3.11. Detailed content of the proposed training on the main derived variables	13
3.4. Teaching principles and material	13
3.5. Organisation of the training.....	13
4. The proposed training scheme on business statistics	13
4.1. Objectives of the proposed training.....	13
4.2. Content of the training : a general presentation.....	13
4.3. Detailed content of the proposed training scheme on business statistics.....	14
4.3.1. Detailed content of the proposed training on the statistical definition of the enterprise.....	14



4.3.2. Detailed content of the proposed training on the main objects of business statistics : the major statistical variables.....	14
4.3.3. Detailed content of the proposed training on accountancy variables and statistical variables	15
4.3.4. Detailed content of the proposed training on the definition of the size of the enterprises, of size-classes and of specific size categories	15
4.3.5. Detailed content of the proposed training on the classification of economic activities	15
4.3.6. Detailed content of the proposed training on elements of enterprises demography	16
4.4. Teaching principles	16
4.5. Organisation of the training	16
5. The proposed training scheme on services economics	16
5.1. Objectives of the proposed training.....	16
5.2. Content of the proposed training : a general presentation	17
5.3. Detailed content of the proposed training on services economics.....	17
5.3.1. Detailed content of the proposed training on the managerial and economic specificities of the services	17
5.3.2. Detailed content of the proposed training on statistical classifications of services : activities, products and international trade at national and international levels	18
5.3.3. Detailed content of the proposed training on the economic importance of services : production, employment, number of enterprises and international trade for Colombia, the Andean Community, South America, the USA and the World	18
5.3.4. Detailed content of the proposed training on the specificities of the international development of services enterprises	22
5.3.5. Detailed content of the proposed training on the global context : the General Agreement on Trade in Services and the Doha Round negotiations.....	22
5.4. Teaching principles and material	23
5.5. Organisation of the training.....	24
6. The proposed training scheme on the questionnaire for the quarterly survey on services enterprises.....	24
6.1. Objectives of the training	24
6.2. Content of the proposed training : a general presentation	24
6.3. Detailed content of the proposed training scheme on the quarterly questionnaire	24
6.4. Teaching principles and material	26
6.5. Organisation of the training.....	26
7. The proposed training scheme on the motivation of the participants to the quarterly survey.....	26
7.1. Objective of the training	26
7.2. Content of the proposed training : a general presentation	27
7.3. Detailed content of the proposed training scheme on the motivation of the respondents to the quarterly questionnaire.....	27
7.3.1. Detailed content of the proposed training on the general objective and the importance of the survey	27
7.3.2. Detailed content of the proposed training on the strategic interest of the company in answering to the questionnaire	27
7.3.3. Detailed content of the proposed training on the argumentation to answer the main concerns of the companies.....	27
7.4. Teaching principles and material	27
7.5. Organisation of the training.....	28
8. The proposed training scheme on DANE's activities and products	28
8.1. Objectives of the training	28
8.2. Content of the proposed training scheme on DANE's activities and products	28
8.3. Teaching principles and material	28
8.4. Organisation of the training.....	28



Annex 1 Training suggestions29
Annex 2 Detailed content of the proposed training scheme on services economics ...30



Introduction

A new survey is in the process of introduction, on a quarterly basis, for the production of statistics on services activities. This will complement the results already obtained through an existing annual survey on the same activities.

This new quarterly survey may raise, in some instances, specific problems of understanding and interpretation of the questions. It is thus important that the persons who will be concretely in charge of the collection of the data share themselves the same understanding and the same interpretation of the concepts put forward and of the questions raised, so as to make sure that answers are given in the most homogeneous possible way. On top of that, companies may, as in many other instances, be reluctant to dedicate the necessary resources to fill out the questionnaires considered. In this case, the surveyor will need to be equipped with the necessary arguments to convince the company of the interest it has to fulfil the questionnaire.

The training scheme which is proposed in the continuation of this report aims at providing competencies to the surveyors involved in the quarterly survey on services enterprises on both aspects, that is the comprehension of the questionnaire and the argumentation about its importance to the company. These two competencies can, however, not be built from scratch. Their acquisition supposes that surveyors hold more general and transversal competencies, especially in the field of enterprises economics, business statistics and services economics, but also in relation with the general activities and products of DANE.

The main objective of this report is to detail the main constituting elements, as well as the main procedures and material that can be used in the development of this training. It will be organised around the six major topics identified above, that is : enterprises economics, business statistics, services economics, understanding and assistance in the filling of the quarterly questionnaire, motivation of the participant to the survey and, finally, knowledge of the activities and products of DANE. Before presenting the detailed objectives, contents, pedagogic principles and organisation of the training on each of these subjects, this report will, first, take the stake of the current situation with regard to the training of the surveyors in relation with the annual survey of services enterprises, so as to build on what already exists.



1. THE EXISTING TRAINING SCHEME AIMED AT THE SURVEYORS IN CHARGE OF THE ANNUAL SURVEY ON SERVICES ENTERPRISES IN DANE

A general training scheme has been conceived for the annual questionnaire at the time of its introduction and this training has been performed on a yearly basis for a while. Then, because of a lack of resources and interest, this general training has been replaced by more specific meetings focused on specific problems encountered in the performance of the survey or on new questions raised.

1.1. The public of the existing training scheme

The public of the existing training scheme related to the implementation of the annual survey on services enterprises is made of the local and regional managers of the survey as well as of the surveyors in charge of the administration of the questionnaire themselves. There are about 50 surveyors potentially concerned. These surveyors are organised in local pools, with a large autonomy being kept at the local level as regards the detailed organisation of these pools. These are sometimes, but not systematically, organised along thematic lines. Most of these surveyors hold a general formation in economics at University level.

1.2. Organisation

As said above, for several years now, the organisation of this training does not have systematic characteristics in terms of number of persons trained, number of sessions organised, number of trainees by session or length of sessions and of classes.

1.3. Content of the training

The original general training scheme conceived in relation with the implementation of the annual survey on services enterprises included a short presentation on services economics, although very limited. It is the intent of DANE to develop this presentation on services economics in the future.

On the other hand, the general training scheme did not include presentations on enterprises economics or business statistics. It did not include any presentation of DANE's activities and products either, although this corresponds to an identified need. This need will be satisfied in a near future through the creation of a specific web page which is currently under development.

There was no specific training planned on the motivation of the responding enterprise either, partly because the annual survey is mandatory, partly because there is not a big problem of responding rate, which is above 90 % in the case of the annual survey. In spite of this, there is nevertheless an interest in the development of such a training.

The original training scheme thus primarily focused on the annual questionnaire itself, on its content and on the potential problems raised by the questions included.

1.4. Teaching principles and material used

The teachers involved in the training scheme related to the annual survey on services enterprises are specialists from the various departments of DANE in charge of the methodology, the production, the logistic, the statistical design and the thematic aspects.



The pedagogic principles are mainly defined by the trainer, although some common features are discussed and defined in common. In particular, there is no systematic breakdown between direct transfers from teachers and own production by participants. The material used is mainly constituted of slides.

2. THE PROPOSED TRAINING SCHEME RELATED TO THE IMPLEMENTATION OF THE QUARTERLY SURVEY ON SERVICES ENTERPRISES : A GENERAL PRESENTATION

2.1. The public targeted by the training scheme

The first point to be defined in the design of any training scheme is the public targeted by the training. In this case, the proposed training scheme targets two kinds of public, who are :

- The surveyors in charge of the relations with the companies surveyed;
- The local and regional managers in charge of the implementation of the survey who would also act as intermediate trainers, receiving the original training from DANE's specialists and transmitting it to the surveyors.

2.2. The objective of the training scheme

The second point which is to be defined in the conception of a training scheme is about its objectives. These objectives have to be defined according to the publics targeted, when there are manifold, as in this case. It is also very important to distinguish between direct objectives and final objectives of the training, the direct objectives being made of the direct results to be achieved, in terms of knowledge and competencies acquired, at the end of the training while the final objectives are made of the objectives that the acquisition of these knowledge and competencies is allowing to achieve.

In this case, the direct objective of the training of the surveyors is to provide them with the conceptual background and the technical competencies necessary to the right understanding and the full mastering of the quarterly questionnaire, while the final objective is to allow them to explain the framework, the objective and the content of the quarterly questionnaire and to answer the questions that the enterprises surveyed could raise in the process of filling in the questionnaire.

In the case of the local and regional managers, the direct objectives would be the same while the final objective would be to allow them to act as intermediate trainers, receiving the training from the primary trainers within DANE and transferring it to the surveyors under their responsibility.

2.3. Pedagogic principles

The pedagogic principles could slightly change from one topic to the other, as it will be detailed in the following detailed presentation of the content of the training, but they will, however, largely rely on the following :

- a major share of direct transfer from trainers to trainees on conceptual and methodological aspects;
- the most developed possible interaction with and participation of trainees, especially through exercises on technical aspects and time allowed to the sharing of experience.

2.4. Organisation and material used



With a few exceptions, it is proposed that the training be organised for groups of a maximum 15 trainees so as to allow for the maximum interaction with and participation of the trainees.

The material to be used should include slides, paper copies of slides and other documents like methodological manuals, specific documentation and exercises. The specific material to be allowed for will be detailed in the presentation of each topic.

2.5. Time allocated

The full training session presented in the following should be allocated a timeframe of 9 days. The details of this time-schedule will be given according to the chapters covered. As far as the chapters are quite independent from each other and the level of expertise of the participants could be very different on these various chapters, it is very possible, however, to take this program as a “shopping list” from which some chapters could be withdrawn and others developed. It must be made sure, however, that all surveyors and managers master the necessary conceptual background and technical competencies covered, so as to assure the most homogeneous quality as possible in the implementation of the quarterly survey on services activities across the country.

2.6. Content of the training scheme

In order to achieve the pedagogic objectives outlined above, it is proposed that the training scheme include the six following chapters :

1. Enterprises economics (1 day)
2. Business statistics (2 days)
3. Services economics (1 ½ days)
4. The quarterly questionnaire (3 ½ days)
5. The motivation of the respondent (1/2 day)
6. Activities and products of DANE (1/2 day)

The proposed content of these six chapters is further detailed below

3. THE PROPOSED TRAINING SCHEME ON ENTERPRISES ECONOMICS

3.1. Objectives of the training on enterprises economics

The objective of the training on enterprises economics is to provide the surveyors with a basic knowledge of the economic and legal conception of the enterprise, of its organisation and functioning, and of the accountancy rules that apply to it, so as to understand the conceptual and practical environment of the interviewee and, in particular, to understand the basic accounting technicalities to which he could be faced by his interlocutor in the process of answering the questionnaire.

3.2. Content of the training on enterprises economics : a general presentation

The main themes to be dealt with in a very general and short approach of enterprises economics are the following¹ :

- The concepts of enterprise, business, company : definitions and distinctions;
- The economic and legal definitions of the enterprise;
- The organisation of the enterprise;

¹ In parentheses are given the corresponding indicative times to be devoted to the theme. A day is supposed to be equivalent to 6 hours of effective class.



- The structure of the enterprise;
- The various production modes;
- The various forms of alliance between enterprises;
- The management of the enterprise;
- The organisation of the information in the enterprise;

(time allocation for the previous points : ¼ day)

- The main accounts of the enterprise;
- The main accounting variables;
- The main derived variables.

(time allocation for the three last points : ¾ day)

These themes are further detailed below.

3.3. Detailed content of the proposed training scheme on enterprises economics

3.3.1. Detailed content of the proposed training on the concepts of enterprise, business and company

1. The concepts of enterprise, business and company : definitions and distinctions (1 slide)

3.3.2. Detailed content of the proposed training on the economic and legal definitions of the enterprise

1. The economic definition of the enterprise : presentation and discussion (1 slide)
2. The legal definition of the enterprise : the main legal statutes of the enterprise (1 slide)
3. The relation between the economic and the legal definition

3.3.3. Detailed content of the proposed training on the organisation of the enterprise

1. The division of labour within the enterprise and its horizontal decomposition : the main functions within the enterprise (1 slide)
2. The co-ordination of the tasks within the enterprise and its vertical decomposition : the various levels of management (1 slide)
3. The various modes of co-ordination within the enterprise (1 slide for every mode)
 - The mutual adjustment;
 - The direct supervision;
 - The standardisation of the processes;
 - The standardisation of the results;
 - The standardisation of the qualifications.

3.3.4. Detailed content of the proposed training on the structure of the enterprise

1. The functional structuration of the enterprise : Executive and functional directions (1 slide)
2. The divisional structuration of the enterprise around products and/or zones (1 slide)
3. The matric structuration of the enterprise around functions and products (1 slide)
4. The hierarchic structuration of the enterprise (1 slide)



5. The organisation chart of the enterprise : the graphic representation of the structure of the enterprise (1 chart)

3.3.5. Detailed content of the proposed training on the various production modes

1. The classification of the various production modes according to the type of management (1 slide for every type of management)

- The upstream management of the production : the production management based on the forecast of the demand;
- The downstream management of the production : the “Just in time” management;
- The specificities of services with regard to the type of management of demand.

2. The classification of the various production modes according to the territorial implantation of the production capacities (1 slide for every type of implantation)

- The specialised workshops;
- The autonomous workshops;
- The production lines;
- The specificities of services with regard to the territorial implantation of the production capacities.

3. The classification of the various production modes according to the continuity of the production flow : the production in continuous flow and the discontinuous production (1 slide)
This point should allow for a discussion of the specificities of services with regard to the continuity of the production flow.

4. The classification of the various production modes according to the relation with the demand : customisation, standardisation and mass-customisation (1 slide)

This point should allow for a discussion of the specificities of services with regard to the relation with the demand.

5. A synthetic classification of the production modes : definitions and characteristics in terms of automation, relation with demand and stocking (1 slide for every mode) :

- The unit production;
- The batch production;
- The mass production;
- The continuous production;
- Discussion of the specificities of services with regard to automation, relation with demand and stocking.

3.3.6. Detailed content of the proposed training on the various forms of alliance between enterprises (1 slide for every form of alliance)

- The quasi-integration;
- The partnership;
- The joint venture;
- The agreements of co-operation;
- The network enterprise;
- The economic interest grouping;
- The temporary groupings;
- The subcontracting;
- The distribution contracts;
- Discussion of the various types of alliance to be found in the services activities.

3.3.7. Detailed content of the proposed training on the management of the enterprise



1. Definition of the management : its main functions (1 slide for every function)

- The definition of the objectives;
- The choice of the ways and means and their implementation;
- The control of the functioning and of the results of the business;
- The implementation of regulations.

2. The different levels of management : the strategic, tactic and operational management (1 slide)

3.3.8. Detailed content of the proposed training on the organisation of the information within the enterprise

1. The various types of information within the enterprise (1 slide for every type or distinction)

- Internal and external information;
- Command and control information;
- Basic and derived information;
- Information on various flows : goods and services, financial assets, personnel, equipment.

2. The information system of the enterprise : definition (1 slide)

3. The information system as a management tool : the production of information for production and control (1 slide)

4. The information system as a strategic tool : the production of information for decision (1 slide)

5. The management of the information within the enterprise : the basic operations (1 slide for every operation)

- Data collection and acquisition;
- Storage;
- Treatment;
- Communication (edition and distribution).

3.3.9. Detailed content of the proposed training on the main accounts of the enterprise²

1. The main accounts of the enterprise : a general presentation (1 slide for every account)

- The production account;
- The profit and loss account;
- The revenue account;
- The distribution and use of revenue account;
- The capital account;
- The financial account.

2. The balance sheet : a detailed presentation

2.1. The balance sheet : general structure (1 slide)

2.2. The balance sheet : details of its main elements

- Assets (1 slide)
 - Fixed assets (intangible fixed assets, tangible fixed assets, financial fixed assets)

² This point and the following ones are based on the European accounting requirements and could, possibly, have to be adjusted in some instances to the specific accounting requirements in use in Colombia.



- Current assets (floor inventory, payment in advance to the suppliers, book debts, investments, available funds)
- Provisions for deferred charges to be spread over several exercises
- Premiums on the redemption of debentures
- Conversion rate adjustment - Assets
- The valuation of the assets : gross, accumulated depreciation, net

- Liabilities (1 slide)
 - Capital and reserves (capital, share premiums, merger premiums, goodwill on consolidation, revaluation reserves, reserves, unappropriated earned surplus, grants, regulated provisions)
 - Provisions for liabilities and charges
 - Accounts payable
 - Conversion rate adjustment - Liabilities

- Addendum : the capital of the enterprise (1 slide)
 - Distinction between intangible, tangible and financial assets

3. The profit and loss account : a detailed presentation of its main elements

- Expenses (1 slide)
 - Operational expenses (purchases of goods for resale, inventory changes, purchases of raw materials, supplies and other consumables, other purchases and external charges, taxes and similar levies, wages and salaries, social security contributions, depreciation, depletion and amortisation, other charges)
 - Financial costs (depreciation, depletion and amortisation, interests and assimilated charges, negative exchange differences, net loss on disposal of securities)
 - Exceptional and extraordinary items (exceptional and extraordinary expenses, exceptional and extraordinary charges on capital, depreciation, depletion and amortisation)
 - Employees' profit sharing account
 - Corporation tax

- Income (1 slide)
 - Operational income (sale of goods, production of goods and services sold, stored production, fixed production, operational grants, write-back of depreciation and provisions, transfer of charges, other income)
 - Net turnover
 - Financial income (income from investment in and loans to undertaking in which the business has a participating interest or joint venture, gain on disposal of capital goods and claims on fixed assets, other interests and assimilated incomes, write-back of provisions and transfer of charges, positive exchange differences, net gain on disposal of securities)
 - Exceptional and extraordinary items (exceptional and extraordinary operational income, exceptional and extraordinary income on capital, write-back of provisions and transfer of charges)

3.3.10. Detailed content of the proposed training on the main variables of the other accounts of the enterprise (1 document and slides)

- The production;
- The consumption;
- The gross value added;
- The gross operating result;
- Interest and dividends;



- The gross disposable income;
- The gross saving;
- The investment;
- The increase in stocks;
- The net lending;
- Financial and monetary investments;
- Issues of shares;
- The net indebtedness;
- Adjustment.

3.3.11. Detailed content of the proposed training on the main derived variables (1 slide)

- The value added ratio;
- The rate of investment;
- The self-financing ratio of investments;
- The self-financing ratio of capital commitments.

3.4. Teaching principles and material

The session on enterprises economics should mainly, if not exclusively, rely on direct transfers from teachers, as there is a need of transfer of basic principles and concepts. According to the time available for the session, it could be appropriate to include an exercise at the end of the presentation of every main theme so as to check the appropriation and right understanding of the corresponding principles and concepts by the participants.

The direct transfer of concepts and principles should rely on the use of a traditional material, i.e. slides and paper collection of slides. The exercises, on the other hand, could rely on short papers setting out concrete practical situations and asking for the application of the concepts and principles involved.

3.5. Organisation of the training

It comes out from what precedes that it is proposed to devote 1 day to the training on enterprises economics.

It is proposed that the sessions be organised for groups of around 15 surveyors, so as to assure the maximum interaction and participation of the attendees.

4. THE PROPOSED TRAINING SCHEME ON BUSINESS STATISTICS

4.1. Objectives of the training

The direct objective of the training on business statistics is to provide the surveyor with an in-depth knowledge and understanding of the field of business statistics and its relation with the conceptual environment of the company, in particular with respect to the definition of the economic and statistical units, of the major demographic events and of the basic statistical variables and their relation with accounting variables.

The final objective of the training is to allow him to explain the subtleties of the questionnaire and to answer the questions of his interlocutor in the process of filling the questionnaire.

4.2. Content of the training : a general presentation



The main themes to be dealt with in a very general and short approach are the following :

- the statistical definition of the enterprise (1/4 day);
 - main objects of business statistics : the major statistical variables (1/2 day);
 - accountancy variables and statistical variables;
 - Definition of the “size of enterprise”;
- (time allocation for the two previous points : ¼ day)
- The classification of economic activities (1/2 day);
 - elements of enterprises demography (1/2 day).

These themes are further developed below.

4.3. Detailed content of the proposed training scheme on business statistics

4.3.1. Detailed content of the proposed training on the statistical definition of the enterprise

1. The concept of statistical unit (1 slide)
2. Presentation of the statistical definition of the enterprise (1 slide)
3. Analysis and discussion of the statistical definition : examples of “statistical enterprises” based on concrete situations, examples of entities which are not constituting a statistical enterprise, analysis of border cases.
4. The relations between the statistical, the economic and the legal definitions of the enterprise, the business and the company (1 slide)
5. Analysis and discussion of the relations between the statistical, the economic and the legal definitions of the enterprise, the business and the company, based on concrete cases.
6. Other concepts of statistical unit : detailed definition (1 slide for every concept)
 - the local unit;
 - the kind-of-activity unit;
 - the local kind-of-activity unit;
 - the establishment;
 - the enterprise group;
 - other units : employer, legal unit, VAT unit.
7. Analysis and discussion of the relations between the concept of enterprise and the other concepts of statistical unit
8. The choice of the unit of observation for the statistical analysis of the production system (1 slide and discussion)

4.3.2. Detailed content of the proposed training on the main objects of business statistics : the major statistical variables

1. The structuration of Business statistics : geographical cover (1 slide), analytical units (1 or 2 slide(s)), sectoral classification (1 slide and corresponding classifications), breakdown by size class (1 slide).
2. The major statistical variables : general presentation (1 slide)
3. The major statistical variables : detailed definition (1 slide for every variable) :
 - Number of enterprises;
 - Number of local units;



- Number of persons employed;
- Number of employees;
- Turnover;
- Value added at factor costs;
- Personnel costs;
- Gross wages and salaries;
- Total investments;
- Total expenditure on R&D;
- Exports;
- Imports;
- Percentage of the production sold on the domestic market.

4.3.3. Detailed content of the proposed training on accountancy variables and statistical variables

1. From turnover to the value of production (1 slide)
2. From the value of purchases to the value of intermediate consumption (1 slide)
3. From turnover to the value added (1 slide)
4. The value added as factor payments (1 slide)
5. The calculation of the statistical number of persons employed during a period (1 slide)
6. The calculation of the statistical number of employees during a period (1 slide)

4.3.4. Detailed content of the proposed training on the definition of the size of the enterprise, of size-classes and of specific size categories

1. Analysis and discussion of the various potential criteria for the definition of the size of the enterprise : Number of employees, number of persons employed, turnover (1 slide);
2. The choice of the criterion (or criteria) used : definition and discussion (1 slide);
3. The size-class breakdown of business statistics based on the number of employees : definition of the size-classes (1 slide)
4. The definition of specific size categories of enterprises (1 slide for every category) :
 - The enterprises with no waged employees;
 - The very small enterprises;
 - The small enterprises;
 - The medium-sized enterprises;
 - The small and medium sized enterprises;
 - The large enterprises.

4.3.5. Detailed content of the proposed training on the classification of economic activities

1. The concept of economic activity (1 slide);
2. The need for a classification of economic activities (1 slide);
3. The main international classifications of activities in use (1 slide);



4. The classification of activities in use in the production of business statistics in Colombia (1 slide and the corresponding document);

5. The definition of the main activity of the enterprise (1 slide)

4.3.6. Detailed content of the proposed training on elements of enterprises demography (1 document)

1. Definition of the concept of enterprises demography (1 slide);

2. The main variables of enterprises demography : a general presentation (1 slide)

3. The main variables of enterprises demography : a detailed definition (1 slide for every variable)

- The number of enterprises births;
- The concepts of genuine births and non-genuine births (or resumptions);
- The number of enterprises deaths;
- The concepts of genuine deaths (or cessations) and non-genuine deaths (or suspensions);
- The definition of the date of the business birth;
- The definition of the legal status of the enterprise : sole proprietorship, partnership (specific, limited liability etc.), company constituted under civil law, company with share capital, association etc.
- The number of local units belonging to the enterprise;
- The concept of attachment of the enterprise to an enterprise group.

4.4. Teaching principles and material

The session on business statistics should again mainly, if not exclusively, rely on direct transfers from teachers, as there is a need of transfer of basic principles and concepts. According to the time available for the session, it could also be appropriate to include an exercise at the end of the presentation of every main theme so as to check the appropriation and right understanding of the corresponding principles and concepts by the participants.

The direct transfer of concepts and principles should rely on the use of a traditional material, i.e. slides and paper collection of slides. The exercises, on the other hand, could rely on short papers setting out concrete practical situations and asking for the application of the concepts and principles involved.

4.5. Organisation of the training

It comes out from what precedes that it is proposed to devote 2 days to the training on business statistics.

It is proposed that the sessions be organised for groups of around 15 surveyors, so as to assure the maximum interaction and participation of the attendees.

5. THE PROPOSED TRAINING SCHEME ON SERVICES ECONOMICS

5.1. Objectives of the proposed training

The main direct objective of the proposed training on services economics is to provide the surveyor with an in-depth knowledge and understanding of the specificities of the services activities, of the specificities of their international development, of their importance in modern



economy as well as of the current global context surrounding the international development of these activities.

The final objective of this training is to allow the surveyors to fully understand the context in which evolve their interlocutors, which is essential to a good communication between the surveyor and the company surveyed and, consequently, to the quality of the answers given by the respondent.

5.2. Content of the proposed training : a general presentation

The main themes to be dealt with in a very general and short approach of services economics are the following :

- the managerial and economic specificities of services (1/4 day);
- the statistical classifications of services : activities, products and international trade (1/2 day);
- the economic importance of services in Colombia and in the rest of the world : production, employment, number of enterprises, international trade (1/4 day);
- the specificities of the international development of service companies : direct international trade versus direct investment trade (1/4 day);
- the global context : the General Agreement on Trade in Services (GATS) and the Doha Round negotiations (1/4 day).

These themes will be further developed below. As this field of analysis is relatively new and as a specific interest has been expressed in this respect, the content of this proposed training scheme will be a bit further elaborated.

5.3. Detailed content of the proposed training on services economics

5.3.1. Detailed content of the proposed training on the managerial and economic specificities of the services

1. The search of an economic definition

1.1. The (non) definition of services in classical economics (1 slide)

Presentation of the definition of services by Adam Smith as “non productive activities”.

1.2. The “negative” definitions of services by Alan Fisher and Colin Clark (1 slide)

The origin of the concept of the “tertiary sector”.

1.3. The first positive definition of services by Jean Fourastié (1 slide)

Presentation of the definition of services by Jean Fourastié based on the characteristics of demand and productivity of these activities.

1.4. The composite definitions of services : the search for economic specificities (1 slide)

Presentation and discussion of the main economic characteristics often attributed to services activities : inflation, absence of intermediate consumption, weak investment, low productivity etc.

1.5. The modern definitions of services by T.P. Hill and Jean Gadrey and the concept of service relation (1 slide + 1 scheme on the concept of service relation)

The concept of service relation relies the user, the provider and the object of the service.

2. The search of a managerial definition : the four pillars of the managerial definition of services (1 slide : scheme)



Definition and discussion of the concepts of immateriality, simultaneity, interaction and heterogeneity.

3. The United Nations SNA definition of services (1 slide)

5.3.2. Detailed content of the proposed training on statistical classifications of services : activities, products and international trade at national and international levels

1. The boundaries of services : the treatment of specific sectors (1 slide)

Discussion of the inclusion or exclusion of the transport, retail trade, financial services and public services sectors in/from the “services activities”.

2. The distinction between and the treatment of market services and non market services (1 slide)

The definition of non-market services and the question of the inclusion or exclusion of these non-market services in the services statistics.

3. The general presentation of the classifications : classification of the classifications (1 slide : table)

4. The classification of services activities : structure and content (2 slides and documentation)

Presentation of ISIC and ISIC adapted to Colombia.

5. The classification of services products : structure and content (1 slide and documentation)

Presentation of the CPC.

6. The classification of international trade in services : structure and content (2 slides and documentation)

Presentation of the EBOPS and GNS classifications.

5.3.3. Detailed content of the proposed training on the economic importance of services : production, employment, number of enterprises and international trade for Colombia, the Andean Community, South America, the USA and the World

1. The importance of services in production

This theme will be tackled through the six following perspectives :

1.1. The importance of services in the production of Colombia and others : shares of agriculture, manufacturing and services in the GNP of Colombia, the Andean Community, South America, the USA and the world : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table).

It is important to have a comparison, as far as possible, between the domestic situation and that of “reference” foreign countries or regions, defined as the countries and regions which are the main economic partners of Colombia, but this, of course, depends on the data availability.

1.2. The evolution of the services production : the growth rate of the value added in agriculture, manufacturing, services and the whole economy in Colombia : last 20 years, last 10 years, last year available (1 slide : 3 graphs corresponding to the three periods or 1 table).

It is important to have a time perspective in the analysis of the importance of services in the production but this, again, depends on the data availability.



1.3. The growing importance of the services in the Colombian economy : shares of agriculture, manufacturing and services in GNP in 1980, 1990, 2000 and last year available (1 slide : 4 graphs corresponding to the four periods or 1 table)

1.4. The main services sectors in Colombia : shares of Retail trade, Horeca (for Hotels, Restaurants and Cafés), Transport, Telecommunications, Banking, Insurance, Business services and Personal services in the GNP of Colombia, the Andean Community, South America, the USA and the world : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table).

The sectoral breakdown proposed here is the most appropriate from an analytical perspective but it could be adjusted, again, according to the data availability.

1.5. The evolution of the services production : the growth rate of the value added in Retail trade, Horeca, Transport, Telecommunications, Banking, Insurance, Business services, Personal services and the whole services in Colombia : last 20 years, last 10 years, last year available (1 slide : 3 graphs corresponding to the three periods or 1 table)

1.6. The modification of the structure of the services sector : shares of Retail trade, Horeca, Transport, Telecommunications, Banking, Insurance, Business services and Personal services in the GNP of Colombia in 1980, 1990, 2000 and last year available (1 slide : 4 graphs corresponding to the four periods or 1 table)

2. The importance of services in employment

This theme will be tackled, again, through six perspectives :

2.1. The importance of services in today's employment : shares of agriculture, manufacturing and services in the total employment in Colombia, the Andean Community, South America, the USA and the world : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table)

2.2. The evolution of employment in Colombia : the growth rate of employment in agriculture, manufacturing, services and the whole economy in Colombia : last 20 years, last 10 years, last year available (1 slide : 3 graphs corresponding to the three periods or 1 table)

2.3. The changing structure of employment in Colombia : shares of agriculture, manufacturing and services in total employment in 1980, 1990, 2000 and last year available (1 slide : 4 graphs corresponding to the four periods or 1 table)

2.4. The structure of the services employment : shares of Retail trade, Horeca, Transport, Telecommunications, Banking, Insurance, Business services, Personal services in the total employment of Colombia, the Andean Community, South America, the USA and the world : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table)

2.5. The evolution of employment in the main services sectors : growth rate of employment in Retail trade, Horeca, Transport, Telecommunication, Banking, Insurance, Business services, Personal services and the whole services sector in Colombia : last 20 years, last 10 years, last year available (1 slide : 3 graphs corresponding to the three periods or 1 table)

2.6. The changing structure of employment in the services sector : shares of Retail trade, Horeca, Transport, Telecommunication, Banking, Insurance, Business services and Personal services in the total employment in Colombia in 1980, 1990, 2000 and last year available (1 slide : 4 graphs corresponding to the four periods or 1 table)

3. The importance of services in enterprises demography



It is proposed to tackle the importance of services in enterprises demography through 11 points, not because this perspective would be much more important than the previous ones but because this analysis could be a bit more complex and could require a bit more detailed look.

3.1. The importance of services in the population of enterprises : shares of agriculture, manufacturing and services in the total population of enterprises in Colombia, the Andean Community, South America, the USA and the world : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table)

3.2. The dynamism of the services sector (1) : growth rate of the number of enterprises in agriculture, manufacturing, services and the total economy in Colombia : last 20 years, last 10 years, last year available (1 slide : 3 graphs corresponding to the three periods or 1 table)

3.3. The dynamism of the services sector (2) : shares of agriculture, manufacturing and services in the total number of enterprises creations in Colombia, the Andean community, South America, the USA and the world : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table)

3.4. The changing structure of the population of enterprises in Colombia : shares of agriculture, manufacturing and services in the total population of enterprises in Colombia : 1980, 1990, 2000 and last year available (1 slide : 4 graphs corresponding to the four periods or 1 table)

3.5. The size of the services enterprises – a sectoral analysis : average size (in terms of persons employed) of agriculture, manufacturing and services enterprises in Colombia : last year available (1 slide : 1 graph or 1 table)

3.6. The size of the Colombian services enterprises – an international analysis : average size (in terms of persons employed) of services enterprises in Colombia, the Andean Community, South America, the USA and the World : last year available (1 slide : 1 graph or 1 table)

3.7. The importance of the main services sectors in the total population of enterprises : shares of Retail trade, Horeca, Transport, Telecommunications, Banking, Insurance, Business services, Personal services and the whole services sector in the total population of enterprises in Colombia, the Andean Community, South America, the USA and the world : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table).

3.8. The dynamism of the services sectors (1) : growth rate of the number of enterprises in Retail trade, Horeca, Transport, Telecommunications, Banking, Insurance, Business services, Personal services and the whole services sector in Colombia : last 20 years, last 10 years, last year available (1 slide : 3 graphs corresponding to the three periods or 1 table)

3.9. The dynamism of the services sectors (2) : shares of Retail trade, Horeca, Transport, Telecommunications, Banking, Insurance, Business services and Personal services in the total number of enterprises creations in Colombia, the Andean Community, South America, the USA and the World : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table)

3.10. The changing structure of the services sector in Colombia : shares of Retail trade, Horeca, Transport, Telecommunications, Banking, Insurance, Business services and Personal services in the total number of enterprises in Colombia : 1980, 1990, 2000, last year available (1 slide : 4 graphs corresponding to the four periods or 1 table)



3.11. The size of the services enterprises – a sectoral and international analysis : average size (in terms of number of persons employed) of enterprises in the Retail trade, Horeca, Transport, Telecommunications, Banking, Insurance, Business services, Personal services and the whole services sectors in Colombia, the Andean Community, South America, the USA and the world : last year available (1 slide : 5 graphs corresponding to the five countries/regions or 1 table)

4. The importance of services in international trade

In this case, it is proposed to tackle this theme through the eight following points.

4.1. The importance of services in the international trade of Colombia - an international comparison : shares of merchandises and services in total exports and imports of Colombia, the Andean Community, South America, the USA and the world : last year available (1 or 2 slides : 10 graphs for imports and exports of the five countries/regions or 1 table)

4.2. The dynamism of international trade in services : growth rates of total (imports + exports) international trade in merchandises and international trade in services for Colombia, the Andean Community, South America, the USA and the world : last 20 years, last 10 years, last year available (1 slide : 3 graphs corresponding to the three periods or 1 table)

4.3. The changing structure of international trade : shares of merchandises and services in the total exports and imports of Colombia, the Andean Community, South America, the USA and the world : 1980, 1990, 2000 and last year available (1 slide : 1 table)

4.4. The world market shares : the shares of Colombia, the Andean Community and South America in world exports and imports of services : 1980, 1990, 2000 and last year available (1 slide : 2 graphs corresponding to exports and imports or 1 table)

4.5. The evolution of the balance of the international trade in services for Colombia : imports, exports and balances of services trade in 1980, 1990, 2000 and last year available (1 slide : 1 graph or 1 table)

4.6. The main partners of Colombia in its exports and imports of services : shares of the Andean Community, South America and the USA in the total exports and imports of services from and to Colombia (1 slide : 2 graphs corresponding to exports and imports or 1 table)

4.7. The content of international trade in services : shares of Transport, Tourism, Financial services, Business services and other services in the services exports and imports of Colombia, the Andean Community, South America, the USA and the world : last year available (2 slides : 10 graphs corresponding to exports and imports of the five countries/regions or 2 tables corresponding to exports and imports)

4.8. The changing structure of international trade in services : shares of Transport, Tourism, Financial services, Business services and other services in the services exports and imports of Colombia : 1980, 1990, 2000, last year available (1 slide : 4 graphs corresponding to the four periods or 1 table).

If this section on the importance of services in international trade was to be further developed, it could be considered to add, along the same dimensions of analysis and with the same characteristics, a presentation of the following elements :

- The dynamism of international trade in the various services sectors (analysis of the importance of the various services sectors in international trade at various periods);
- The world market shares in the international trade in various services;



- The evolution of the balance of Colombia in the international trade of specific services (analysis of the balance of Colombia in the international trade of specific services at various periods);
- The main partners of Colombia in its exports and imports of services.

5.3.4. Detailed content of the proposed training on the specificities of the international development of services enterprises

1. The share of services in the domestic economy vs the share of services in the international trade : analysis of a discrepancy (1 slide and discussion)

This discussion should allow to highlight that the share of services in the domestic economy is much more important than in international trade. The discussion of the origin of this discrepancy should allow to introduce the distinction between direct international trade in services and direct investment trade in services (next slide).

2. Direct international trade in services : definition and examples / Direct investment trade in services : definition and examples (1 slide)

3. The geography of the direct international trade in services (1 slide)

The geography of the direct international trade in services refers to the distinction between international trade in services with no movement of either the consumer or the producer, international trade in services through the movement of the consumer and international trade in services through the movement of the producer. The analysis of this geography thus allows to introduce three of the four modes of international trade in services as defined in the framework of the GATS.

4. The legal and technical conditions of the direct international trade and direct investment trade in services (1 slide : table)

This presentation should allow to introduce, in particular, the rules of market access and national treatment. It should also highlight the importance of transport and telecommunications facilities in the development of international trade in services.

5.3.5. Detailed content of the proposed training on the global context : the General Agreement on Trade in Services and the Doha Round negotiations

1. The impediments to international trade in services : barriers and obstacles (definitions and examples) (1 slide)

It is important to make the distinction clear between obstacles, i.e. technical impediments, and barriers, i.e. legal impediments, to international trade in services.

2. The legal barriers to international trade in services : specific vs unspecific barriers, general vs sectoral barriers (1 slide)

Again, it is important to make the distinction, first, between unspecific barriers (i.e. rules which apply to all providers) and specific barriers (i.e. rules which only apply to foreign providers) and between general barriers (i.e. rules which apply to all sectors) and sectoral barriers (i.e. rules which apply to specific sectors).

3. The liberalisation of ITS : general presentation of the GATS (3 slides)

This point aims at presenting the history of the GATT, the chronology of the Uruguay Round and the main topics of the Uruguay Round negotiations.

4. The structure of the GATS : general framework, sectoral annexes and specific commitments (1 slide).



5. The general framework : article 1 : the definition of international trade in services : the four modes of transaction (1 slide)

6. The general framework : main articles (2 slides and documentation)

This point should allow, in particular, to highlight and discuss Articles 16 on Market access and 17 on National treatment.

7. The sectoral annexes : general presentation (1 slide).

This general presentation should focus on the principle of the sectoral annexes to the GATS, their origin, their content and their goal.

8. The sectoral annex on Telecommunications : main elements (1 slide and documentation)

9. The sectoral annex on Air transport : main elements (1 slide and documentation)

10. The sectoral annex on Sea transport : main elements (1 slide and documentation)

11. The sectoral annex on Financial services : main elements (1 slide and documentation)

12. The specific commitments : presentation of the general mechanism (1 slide)

This presentation should clearly define the specific commitments as commitments with respect to market access and national treatment.

13. The specific commitments of Colombia : main elements (1 slide and documentation)

14. The further negotiations conducted in the framework of the GATS : general presentation (1 slide)

This general presentation should detail the themes of the negotiations, the participants to these negotiations and their chronology.

15. The negotiations conducted on Telecommunications : content and main results (1 slide)

16. The negotiations conducted on Air transport : content and main results (1 slide)

17. The negotiations conducted on Sea transport : content and main results (1 slide)

18. The negotiations conducted on Financial services : content and main results (1 slide)

19. The Doha Round : general presentation (1 slide)

20. The Doha Round negotiations on services : main sectors at stake (1 slide)

21. The Doha Round negotiations on services : stock of the situation (1 slide)

22. The Doha Round negotiations on services : main stakes for Colombia (1 slide)

23. The Doha Round negotiations on services : the main negotiating positions of Colombia (1 slide)

5.4. Teaching principles and material

Again, the main teaching principles to be applied in this session are based on a direct transfer from teachers, as far as the session mainly consists in the transmission of concepts and analyses, even though the maximum interaction and participation of attendees should again be pursued. In order to increase this interaction, it could be considered, in particular,



that the participants themselves be asked to make a short research and a short presentation on the content of the General Agreement on Trade in Services and on the current Doha Round negotiations.

The material to be used in this approach would, again, mainly consist in slides and paper collections of slides.

5.5. Organisation of the training

It comes out from what precedes that it is proposed to devote one and a half day to the training on services economics.

The groups should be organised in the same way as for the previous sessions on enterprises economics and business statistics, that means that they should be made of 15 persons maximum so as to allow a strong participation of all trainees through, in particular, short presentations on GATS and Doha by groups of 3 to 4 participants maximum.

6. THE PROPOSED TRAINING SCHEME ON THE QUESTIONNAIRE FOR THE QUARTERLY SURVEY ON SERVICES ENTERPRISES

6.1. Objectives of the training

The direct objective of the proposed training scheme on the quarterly questionnaire is to allow the surveyors to fully master the concepts, the technicalities and the potential problems raised by the quarterly questionnaire. The final objective is to allow them to explain these technicalities to the respondents and to answer with accuracy and precision to the questions the respondents could raise in the process of filling the questionnaire. This supposes that limit-cases specific situations be identified and treated within the session.

6.2. Content of the training : a general presentation

The achievement of these objectives implies that the proposed training closely and systematically follows the unwinding of the questionnaire itself and be organised around its different chapters. The structure of the training is, thus, similar to the structure of the questionnaire :

1. Identification and location (for reminder : 1 hour)
2. Structure of the company (2 hours)
3. Operational revenues (1/2 day)
4. Operational costs (1/2 day)
5. Employment, wages and hours worked (1 day)
6. Exports (1/2 day)
7. Imports (1/2 day)

The content of these points is further developed below.

6.3. Detailed content of the proposed training scheme on the quarterly questionnaire³

1. Identification and location (1slide)

³ This proposal is based on the structure of the quarterly questionnaire proposed in the report on the "Improvement of Services statistics in Colombia" delivered in an earlier phase of this project. It thus should be adjusted to the final version of the questionnaire.



2. Structure of the company

2.1. Establishments

- What is an establishment ? (1 slide)
- The opening of an establishment : definition (1 slide)
- The closure of an establishment : definition (1 slide)
- The number of foreign establishments (: at the end of the period) (1 slide)

2.2. : Economic and legal links

- The control of a subsidiary : definition (1 slide)
- Nationality of the mother company : direct versus final control concepts (1 slide)

3. Operational revenues

- The accounting definition of the operational revenues (1 slide)
- Operational revenues raised in the national market vs exports (1 slide)
- The CPC classification (1 slide and document)

4. Operational costs

- The accounting definition of the operational costs (1 slide)
- Operational costs related to the selling of merchandises vs operational costs related to the production of services (1 slide)
- Operational costs incurred in the national market vs imports (1 slide)

5. Employment, wages and hours worked

5.1. General information

- The types of working relations and contracts : definitions and limit-cases (1 slide for every kind of working relation detailed in the questionnaire + specific documentation)
- The calculation of the average number of persons employed during the quarter (1 slide)
- Wages paid during the quarter : definition (1 slide)
- Social benefits paid during the quarter : definition (1 slide)
- The calculation of the total number of hours worked during the quarter (1 slide)

5.2. Evolution of employment

- Definition of job creation (1 slide)
- Definition of job deletion (1 slide)

6. Exports

- The definition of the four modes of transaction (1 slide)
 - Detailed definition, analysis of limit-cases and examples of mode 1 exports (1 slide)
 - Detailed definition, analysis of limit-cases and examples of mode 2 exports (1 slide)
- This point should allow to answer the questions of who are the non-resident customers present in Colombia and how to identify them.
- Detailed definition, analysis of limit-cases and examples of mode 3 exports (1 slide)
- This point should allow to answer the question of what is a foreign establishment or a foreign subsidiary
- Detailed definition, analysis of limit-cases and examples of mode 4 exports (1 slide)
- This point should allow to answer the question of what is the temporary movement of natural persons travelling on behalf of the company
- The concept of services volumes and the volume units for the main services sectors (1 slide)

7. Imports



- Detailed definition, analysis of limit-cases and examples of mode 1 imports (1 slide)
 - Detailed definition, analysis of limit-cases and examples of mode 2 imports (1 slide)
 - Detailed definition, analysis of limit-cases and examples of mode 3 imports (1 slide)
- This point should allow to answer the question of who are the mode 3 imports providers in Colombia
- Detailed definition, analysis of limit-cases and examples of mode 4 imports (1 slide)
- This point should allow to answer the question of who are the natural persons travelling in Colombia to provide services on behalf of their company

6.4. Teaching principles and material

The training scheme on the quarterly questionnaire should rely on both direct transfers from teachers and a strong involvement of the participants, so as to assure the right appropriation and the full mastering of the concepts, questions and difficulties raised by the filling of the questionnaire in all its aspects. This supposes that for every point dealt with within this session, a practical exercise follows the direct transfer made by the teacher for about the same amount of time, including a restitution by a participant or a reduced group of participants (2 to 3 persons maximum) and a discussion of the restitution by the whole group.

The direct transfer should again rely on a traditional material, i.e. slides and a collection of paper slides but also, in this case, on detailed manuals conceived on the model of the existing manuals on the annual questionnaire⁴. The exercises should be conceived in order to put in practice the concepts presented and to treat specific limit-cases or difficulties.

6.5. Organisation of the training

It comes out from what precedes that the proposed training scheme on the quarterly questionnaire should be devoted three days and a half in total.

As far as a strong participation of all attendees is required so as to make sure that a full mastering of the concepts and difficulties raised by the questionnaire has been acquired by each of them, it is proposed that the sessions be aimed at groups of maximum 15 persons.

7. THE PROPOSED TRAINING SCHEME ON THE MOTIVATION OF THE PARTICIPANTS TO THE QUARTERLY SURVEY

7.1. Objectives of the training

The direct objective of the proposed training scheme on the motivation of the participants to the quarterly survey is to provide the surveyors with the most appropriate argumentation in favour of the survey. The final objective of the training is to allow them to make a short presentation of the survey (in about 2 minutes) in the introduction to every interview and also to answer to the questions and concerns that could be raised by their interlocutors.

⁴ See

- “Manual de critica y codificacion para servicios de Temporal, Agencias de empleo y seguridad privada – Encuesta anual de servicios – EAS 2004”, April 2005;
- “Manual de critica y codificacion para servicios de Hoteles, Restaurantes y similares – Formulario H – Encuesta anual de servicios – EAS 2004”, April 2005;
- “Manual de critica y codificacion para servicios de Agencias de viajes, publicidad, actividades postales y de correo, informatica y actividades conexas – Formularios A, P, O, F – Encuesta anual de servicios – EAS 2004”, April 2005;
- “Manual de critica y codificacion para servicios de Telecomunicaciones – Formulario T – Encuesta anual de servicios – EAS 2004”, April 2005.



7.2. Content of the proposed training : a general presentation

In order to achieve the objectives set out before, the content of this training should include presentations and discussions on the three following elements :

- the general objective and the importance of the survey
- the strategic interest of the company in answering to the questionnaire
- the argumentation to answer the main concerns of the enterprises

7.3. Detailed content of the proposed training scheme on the motivation of the respondents to the quarterly questionnaire

7.3.1. Detailed content of the proposed training on the general objective and the importance of the survey

1. General presentation of the survey, its content and its objective (1 slide)
2. Discussion of its importance to the understanding of the services enterprises and to the formulation of the most appropriate public policies in this respect

7.3.2. Detailed content of the proposed training on the strategic interest of the company in answering to the questionnaire

1. Its general interest in the right understanding of the services companies and in the formulation of the most appropriate public policies in this respect (1 slide)
2. Its specific interest in the information produced : the access to a tailored information (key figures, economic synthesis, benchmarking table...) (1 slide)

7.3.3. Detailed content of the proposed training on the argumentation to answer the main concerns of the companies

1. Length and cost of the answer : estimation of the time required for answering the questionnaire according to the characteristics of the company (activity, size, internationalisation etc.) (1 slide)
2. Availability of the information : how to help the company find the right information in its own information system (1 slide)
3. Other : sharing of experiences of most frequently asked questions by participants

7.4. Teaching principles and material

As far as the training on the motivation of participants to the quarterly survey aims at providing trainees with specific argumentation skills, it should mostly rely on the active participation of the attendees in nearly real situation exercises.

After a short introduction made by the teacher on each of the specific points making up the proposed content, attendees should thus have the opportunity to participate to exercises which should allow them to deal with nearly real situations. These exercises could thus take the form of "role plays" in which one participant has the role of the surveyor and the other has the role of the respondent. To be efficient, these "role plays" have to be designed in a clearly defined objective and to be prepared for a few minutes by the participants involved. Every role play should thus be introduced through a short paper presentation of the situation (i.e. identification and location of the respondent, sector of activity, size, main economic



characteristics) shared by both participants and by a non-exhaustive short presentation of the concerns of the respondent which only the respondent player should have at disposal.

7.5. Organisation of the training

It comes out from what precedes that the session on the motivation of the participants to the quarterly survey should be allocated a total of one day and a half.

To be efficient a role play session should be aimed at groups of between 10 and 15 persons, maximum.

8. THE PROPOSED TRAINING SCHEME ON DANE'S ACTIVITIES AND PRODUCTS

8.1. Objectives of the training

The direct objective of the training scheme on DANE's activities and products is to provide the surveyors with a good knowledge of these activities and products. The final objective is to allow them to make a short presentation on the subject (less than 5 minutes) in introduction of every interview and to answer to the most frequently asked questions raised by interviewees on the subject.

8.2. Content of the proposed training scheme on DANE's activities and products

The main elements of a training scheme on DANE's activities and products should include a presentation on the following elements :

- the general mission of DANE;
 - the thematic organisation of DANE;
- (time allocation for the two previous points : 1 hour)
- the products of DANE (1 hour);
 - the products of DANE aimed at companies (1 hour).

The specific content of this training should, of course, be optimally defined by DANE itself.

8.3. Teaching principles and material

Again, the main teaching objective of this session being the transmission of an information on DANE's activities and products, the session should mainly rely on a direct transfer from DANE's officials on the subject.

In this context, the material to be used should, again, mainly consist in slides and a collection of paper slides. In addition, the provision of a short brochure on DANE's activities and products to all surveyors would be most useful. More generally, the provision of the same short brochure to all companies surveyed would also, if possible, be most useful.

8.4. Organisation of the training

It is proposed that the session on DANE's activities and products be allocated a time frame of one half a day.

As far as this session on DANE's activities and products would be mostly informative and short, and would not require an important interactivity with or participation of the attendees, a single session with the whole pool of surveyors, with nevertheless a limit of 100 participants, could be appropriate.



Annex 1

Services statistics for Colombia : Training suggestions

Slides presented during the meeting held on February 7, 2006

(Power Point file Training 060206.ppt attached)



Annex 2

Services statistics for Colombia :

The detailed proposed content of the training on Services economics and ITS

Slides presented during the meeting held on February 9, 2006

(Power Point file Form-ES-080206.ppt attached)