

Transition from work into retirement

2008 edition

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1 Introduction

The meeting of the Task Force on the Evaluation of the 2006 LFS ad hoc module on 'transition from work into retirement' took place on the 28 /29 November 2007. Besides staff from Eurostat the Task Force consisted of experts from the National Statistical Offices of Estonia, Ireland, Greece, France, Italy, Finland and United Kingdom. The main objective of this report is to assess the implementation of the ad hoc module 2006 and make recommendations for the repetition of the module in 2012. In addition, this report provides information about the quality of the data set and gives a first impression about the results of the module.

This report is based on 27 quality reports, the national questionnaires, the interviewer instructions (which are mostly available in English) and the final grant reports provided by 20 countries. It was the third time that Eurostat used a standardised form for the quality report of the ad hoc modules. These quality reports contain information about the implementation of the ad hoc module as well as quality estimates. In addition, the experts from the national statistical offices (the members of the Task Force) provided contributions for the report.

The report is organised in 7 sections. Following the introduction, section two gives a summary about the policy background of the survey. The third section – the executive summary – informs about the main findings and the recommendations of the Task Force members. Based on the quality reports, the fourth section contains the general description of the ad hoc module and the fifth section provides information about the quality of the module. Section six contains detailed information about implementation of the module, a discussion of the main problems as well as a graphical presentation of the results. Section seven describes the dissemination structure. Further information is collected in the annexes. Annex 1 contains information on national retirement legislation, annex 2 data frequencies, annex 3 the list of variables, annex 4 the explanatory notes, annex 5 the proposed questionnaire and annex 6 the codification of the variables.

2 Policy background and focus of the ad hoc module 2006

The Stockholm and Barcelona targets on employment and participation

The Stockholm European Council conclusions (March 2001) stressed the need to meet the challenges of an ageing society and agreed "...to set an EU target for increasing the average EU employment rate among older women and men (55-64) to 50 % by 2010".

The Barcelona European Council (March 2002) endorsed a policy approach on how to progress in achieving the Stockholm target on older workers and concluded that "a progressive increase of about 5 years in the effective average age at which people stop working in the European Union should be sought by 2010".

Joint Report by the Commission and the Council on adequate and sustainable pensions, adopted by the Council on 6-7 March 2003

Objective 5 of the 11 common objectives in the area of adequate and sustainable pensions that were fixed at the Laeken European Council of December 2001 indicates that "MS should ... ensure that, alongside labour market and economic policies, all relevant branches of social protection, in particular pension systems, offer effective incentives for the participation of older workers; that workers are not encouraged to take up early retirement and are not penalised for staying in the labour market beyond the standard retirement age; and that pension systems facilitate the option of gradual retirement".

Based on the examination of the national strategy reports submitted by Member States in September 2002, the Report concludes that working longer represents an important way of increasing employment rates in general and, thus, a major contribution to improving the financial sustainability in a context of demographic ageing. The Report focuses on the financial incentives to retire early and on the need to review incentive effects of tax/benefit systems with a view to making them more employment-friendly.

The Report from the Commission and the Council on "Increasing labour-force participation and promoting active ageing", adopted by the Council on 7 March 2002

Submitted to the Barcelona summit, it puts forward a life cycle approach to ensure that present and future working generations remain in employment as they grow older and highlights ways to increase and prolong the participation of today's older workers. The report calls for the development and implementation by Member States of comprehensive strategies in five areas:

More jobs and better quality in work: Providing a safe, attractive and adaptable work environment will have a particularly important influence on the decision of older workers to stay in a job and in the labour market. Facilitating a more gradual move into retirement can be encouraged by, for example, the promotion of part-time work. Moreover, an improved work environment, safer working conditions, more flexible working time arrangements and in particular access to training will have a positive impact on labour productivity.

Making work pay: A targeted review of tax/benefit systems to enhance work incentives for older workers is needed. Emphasis should be placed on removing incentives encouraging early retirement and instead encourage experienced workers to stay longer at work by financially rewarding them for longer service.

Higher and adaptable skills at work: Continuing to update skills throughout working life is critical for raising participation and keeping older workers in work longer. The widening gap in the take-up of education and training between older and younger age groups gives cause for serious concern. Providing genuine lifelong learning for older workers requires a general increase in adult education and training, including a catching-up of those aged 55-64 in terms of access to training (currently, those aged 25-34 are nearly five times more likely to take part in education and training than those aged 55-64).

Making work a real option for all: A change of attitudes of employers is essential to recognise better the potential of older workers and to fight discrimination. The Public Employment Services have an important role to play in supporting older workers to find work, and in directly tackling employers' negative attitudes. Increasing the availability and affordability of quality healthcare and eldercare facilities will help to break down labour market barriers for older workers with care responsibilities.

A partnership approach: Public authorities cannot succeed in implementing this approach without support from a wide range of partners. Social partners and employers need to develop working conditions appropriate to keeping older workers in work. The report recommends joint Government/Social partners' initiatives to retain workers longer in employment: this should focus in particular on access to company training and improving working conditions and work organisation.

The Employment Guidelines 2003

Guideline 5 commits Member States to: "... promote active ageing, notably by fostering working conditions conducive to job retention - such as access to continuing training, recognising the special importance of health and safety at work, innovative and flexible forms of work organisation - and eliminating incentives for early exit from the labour market, notably by reforming early retirement schemes and ensuring that it pays to remain active in the labour market; and encouraging employers to employ older workers."

In addition, it highlights that "... policies will aim to achieve by 2010 an increase by 5 years, at EU level, of the effective average exit age from the labour market (estimated at 59,9 in 2001)" and that "In this respect, the social partners have an important role to play."

Furthermore, **Guideline 8** commits Member States to: "... review and, where appropriate, reform tax and benefit systems and their interaction with a view to eliminating unemployment, poverty and inactivity traps, and encouraging the participation of women, low skilled workers, older workers, people with disabilities and those furthest from the labour market in employment."

Focus of the ad hoc module 2006

According to the explanatory notes for the 2006 ad hoc module the first aim was to know how the transition at the end of the career towards full retirement is expected to take place, takes place or took place:

- plans for transitions/past transitions towards full retirement
- plans for exit from work

The second aim was to know which factors would be/were at play in determining the exit from work, and which factors could make/could have made persons postpone the exit from work:

- working conditions factors (health and safety at the workplace, flexible working time arrangements ...)
- other factors linked to work (training/obsolescence of skills ...)
- financial factors (financial incentives to remain at work or to exit)
- personal factors (health, family reasons ...)

Note: The core LFS gives information on previous job characteristics (economic activity, occupation ...) for exits up to 8 years ago.

3 Executive summary

The ad hoc module 2006 on 'transition from work into retirement' is specified by Commission Regulation (EC) No 388/2005 of 8 March 2005. It was the first time that an ad hoc module focussed on topics about transition from work into retirement. On overall the implementation of the module faced substantial problems. The topic transition into retirement is influenced by national legislation, which varies considerably among Member States. It is therefore difficult to be tackled by a European wide survey.

In detail the Task Force members pointed out that a lot of background information was necessary to attain the aims of the module. First of all, there is a complex legislation behind the issues of retirement. In each country there are a lot of exceptional rules or differences for groups of persons (women and men, disability, early retirement, pensions and company pensions, ...) or occupations (army, police, ...) which have to be known for questionnaire design and the analysis of the module. In addition in some Member States the pension system underwent massive reforms in recent years. This caused a lot of strain to questionnaire design as both old and new and also all special regulations during the transitional phase had to be taken into account. Other problems are that in some countries it is common that persons receiving a retirement pension are nevertheless working and that the concept of retirement applies often to the main job. In this case, the explanatory notes were not precise enough with respect to the definition of "persons in retirement" and further investigation will be required. Furthermore it was pointed out that persons often do not know about their retirement plans; especially in times of changing legislation. For the repetition of the module, it should be necessary to clarify the above mentioned issues.

Concerning the design of the questionnaire many countries decided to split the questionnaires and to ask working persons and persons not working (unemployed or inactive) for some variables separately. This approach should be used for the repetition. The questionnaire seems not to be appropriate to grasp the situation of some groups such as self-employed persons. For example the variables FLEXWORK (flexible working time arrangements), OPPSKILL (opportunities to update skills) and HLTHSAF (health/safety at workplace) seem not to be suitable for unemployed persons or persons in retirement. Some countries pointed out that the response categories of some of the variables were either too detailed or inappropriate. The Task Force also discussed the need of an analysis of proxy answers.

As concerns the explanatory notes, the Task Force members recognised that they didn't always give suitable guidance for questionnaire design and interviewer instructions. For example, the term "retirement pension" can be understood in different ways (statutory pension, company pension, or pension from insurance). However, the Explanatory notes relied on ESSPROS-definitions¹ which are appropriate for administrative data collection but not for surveys. For the repetition of the ad hoc module in 2012 an improvement of the explanatory notes is necessary.

4 General description of the ad hoc module

The ad hoc module 2006 was accomplished by all EU-27 Member States as well as Norway. Most of the countries conducted the module in the second quarter of 2006: Belgium, Bulgaria, Denmark, Ireland, Greece, Italy, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Portugal, Romania, Slovenia, Slovakia, and United Kingdom. While the other countries spread the reference weeks over the whole year. One exception was the Netherlands which conducted the survey in the first quarter of 2006.

The target group of the module consisted of all persons aged between 50 and 69 (who either worked or didn't work and worked at least up to the age of 50). Every respondent of this age group in the respective survey period (quarter or all quarters of the year) constituted the sample for the module in most of the countries, with the exception of Czech Republic, Germany, France, Hungary, Austria, Finland, and Sweden, which used sub-samples of the core LFS.

Participation in the module was compulsory in Belgium, Spain, France, Italy, Cyprus, Malta, Portugal and Slovakia. In all other countries the participation was voluntary.

The topics of the module were not closely related to the core question of the LFS. This could be the reason why most of the countries added the ad hoc module questionnaire after the core questionnaire. Italy, Malta, the Netherlands and United Kingdom integrated it into the LFS core questionnaire.

More than half of the participating countries (17) conducted a pilot survey, a pre-test or a laboratory test (Bulgaria, Czech Republic, Denmark, Estonia, France, Ireland, Italy, Cyprus, Lithuania, Hungary, Austria, Poland, Romania, Slovenia, Slovakia, Finland and United Kingdom). On the other hand Greece, Latvia, Malta, and Norway did not test the module questionnaire in advance. All other countries didn't provide information about pre-tests for the module.

¹ ESSPROS: European System of integrated Social Protection Statistics

Burden

The burden of an ad hoc module is a function of many factors, both subjective and objective. Subjective factors can be the relevance of the questions to the situation of the respondent, or the sensitivity of the questions. It is not possible to assess these factors in this report. Objective factors are more readily estimated by measuring the average number of minutes the respondent is subjected to questioning. This single measurement depends, however, on several other factors like the number of questions put to the respondent, the clarity of the questions and the ease of answering (such as the number of categories).

The quality report asked for the average number of minutes required for collecting information for the ad hoc module 2006. As it was not clear which time span (overall interview time or interview time for the ad hoc module) should have been used, the results are not comparable. The thirteen replying countries gave a range of 3 to 20 minutes.

Table 1 shows the number of persons (in thousand) answering the questions, in the quarter(s) during which the data for the ad hoc module were collected.

Table 1. Number of persons answering in the EU-LFS AHM 2006

	Col. 240	Col. 241/2	Col. 243	Col. 244	Col. 245	Col. 246	Col. 247	Col. 248/9	Col. 250	Col. 251	Col. 252/3
BE	4,401	4,401	2,091	855	4,401	4,401	4,401	4,400	2,091	217	4,400
BG		7,995	4,365	3,648	8,021	8,021	8,021	8,019	4,365	495	8,008
CZ	12,857	12,850	6,329	4,976	12,822	12,846	12,846	12,858	6,330	887	12,823
DK	3,287	3,334	1,140	656	3,219	3,266	3,266	3,362	1,152	811	3,300
DE	5,240	13,033	5,487	3,297	12,417	12,404	12,360	12,245	5,430	3,954	11,696
EE	4,399	4,397	1,647	984	4,399	4,399	4,399	4,398	1,647	671	4,385
IE	10,768	10,455	2,779	1,842	9,168	9,168	9,168	10,564	2,894	2,005	10,355
EL	13,483	13,452	5,704	4,453	12,459	12,553	12,371	13,011	5,215	1,770	13,385
ES	16,402	16,457	6,931	2,284	14,881	15,096	15,208	16,536	6,909	2,648	15,058
FR	10,393	9,512	5,005	2,953	9,479	10,485	9,538	10,486	5,010	960	10,477
IT	31,283	31,527	15,541	10,680	30,790	30,941	30,986	30,567	14,430	2,403	29,810
CY	1,742	1,742	611	294	1,742	1,742	1,742	1,742	611	167	1,742
LV	955	581	374	268	953	954	955	929	374	135	955
LT	2,029	2,029	904	588	2,029	2,029	2,029	2,029	904	168	2,029
LU	3,465	3,468	1,657	1,189	3,463	3,466	3,467	3,467	1,649	90	3,464
HU	16,828	16,828	9,446	6,399	16,828	16,828	16,828	16,698	9,426	822	16,827
MT	822	823	345	274	823	823	823	822	345	36	822
NL	20,457	20,474	5,705	3,274	19,064	19,371	19,380	20,474	6,322	1,838	20,219
AT	6,754	6,754	3,537	2,528	6,754	6,754	6,754	6,754	3,537	363	6,751
PL	9,503	9,503	5,030	2,643	9,503	9,503	9,503	9,503	5,030	793	7,483
PT	9,446	9,485	3,603	1,848	9,457	9,463	9,468	9,449	3,598	2,235	9,410
RO	13,987	13,987	6,268	5,313	13,987	13,987	13,987	13,987	6,268	3,864	13,986
SI	2,151	3,909	1,800	1,147	3,909	3,909	3,909	3,909	1,800	286	3,909
SK	6,183	6,183	3,432	2,719	6,181	6,181	6,181	6,183	3,432	350	6,179

	Col. 240	Col. 241/2	Col. 243	Col. 244	Col. 245	Col. 246	Col. 247	Col. 248/9	Col. 250	Col. 251	Col. 252/3
FI	7,206	7,168	2,884	1,145	7,031	7,031	7,031	6,869	2,898	410	7,063
SE	11,275	13,070	2,343	1,294	12,866	12,858	12,919	12,730	2,329	3,408	13,092
UK	22,160	22,673	7,938	4,916	22,002	22,118	22,148	22,093	7,906	4,496	21,845
NO	4,687	4,610	957	351	4,328	4,404	4,345	4,642	955	468	4,654

Note: Unweighted results.

5 Quality of the survey

With the final report for the 2004 ad hoc module Eurostat introduced a concept of quality consisting of 6 main indicators: relevance, accuracy, timeliness and punctuality, accessibility and clarity, comparability and consistency.

Relevance and non-response

Generally, the unit non-response - calculated for those answered to the core LFS - is rather low among member states (see Table 2). Beside those countries with 0% rate (8 countries), there are very low rates (under 1 % in 12 countries), and the rest of the countries show 1-10% rate (7 countries) with the exception of AT, which had the highest rate (13.16%).

Table 2. Unit non-response (%) in the EU-LFS AHM 2006

BE	7.81	BG	7.27	CZ	0.01	DK	5.14	DE	9.75	EE	0.00	IE	0.01
GR	0.00	ES	0.17	FR	0.08	IT	0.09	CY	0.00	LV	4.69	LT	0.00
LU	0.29	HU	2.94	MT	0.96	NL	0.00	AT	13.16	PL	0.18	PT	0.00
RO	0.00	SI	0.05	SK	0.75	FI	0.00	SE	0.01	UK	5.95	NO	0.08

Unweighted results. Share of records with all ad hoc module variables coded blank of all persons in the target group (this value refers to the processed file and not necessarily the original target group).

With respect to the item non-response there are some country specific effects. Within some the participating countries, the unit non-response is rather low, but item non-response rates are high. For analysing the item non-response it is necessary to take into account country specific characteristics (e.g. filtering and interpretation of the questionnaire). Table 3 provides the information on item non-response.

Table 3. Item non-response (%) in the EU-LFS AHM 2006

	Col. 240	Col. 241/2	Col. 243	Col. 244	Col. 245	Col. 246	Col. 247	Col. 248/9	Col. 250	Col. 251	Col. 252/3
BE	7.81	7.81	10.30	.	7.81	7.81	7.81	7.83	10.30	.	7.83
BG	10.	7.58	6.75	.	7.28	7.28	7.28	7.31	6.75	0.20	7.43
CZ	0.09	0.14	0.03	.	0.36	0.17	0.17	0.08	0.02	.	0.34
DK	8.13	6.82	8.36	0.30	10.03	8.72	8.72	6.04	7.40	.	7.77
DE	65.82	14.98	20.81	4.07	19.00	19.09	19.37	20.12	21.63	28.59	23.71
EE	.	0.05	.	.	.	.	.	0.02	.	.	0.32
IE	0.40	3.29	5.41	1.02	15.20	15.20	15.20	2.28	1.50	16.04	4.20
EL	3.82	4.04	5.67	0.40	11.13	10.46	11.76	7.19	13.76	.	4.52
ES	1.79	1.46	1.10	1.25	10.90	9.61	8.94	0.99	1.41	4.20	9.63
FR	1.01	9.40	0.10	.	9.72	0.13	9.15	0.12	.	12.49	0.13
IT	2.87	2.11	2.72	0.45	4.40	3.93	3.79	5.09	9.67	1.31	7.38
CY	.	.	.	.	.	.	.	.	.	.	.
LV	4.69	42.02	7.88	.	4.89	4.79	4.69	7.29	7.88	.	4.69
LT	.	.	.	.	.	.	.	.	.	6.15	.
LU	0.37	0.29	0.36	.	0.43	0.35	0.32	0.32	0.84	.	0.40
HU	2.96	2.96	3.04	.	2.96	2.96	2.96	3.71	3.24	.	2.96
MT	1.08	0.96	2.27	.	0.96	0.96	0.96	1.08	2.27	.	0.96
NL	0.08	.	9.99	0.12	6.89	5.39	5.34	.	0.25	0.54	1.25
AT	13.18	13.18	12.88	.	13.18	13.18	13.18	13.18	12.88	.	13.16
PL	0.86	0.86	0.73	.	0.86	0.86	0.86	0.86	0.73	.	21.92
PT	0.41	.	.	.	0.30	0.23	0.18	0.38	0.14	0.13	0.79
RO	.	.	.	.	.	.	.	.	.	.	.
SI	45.00	0.05	0.06	.	0.05	0.05	0.05	0.05	0.06	.	0.05
SK	0.75	0.75	1.21	.	0.79	0.79	0.79	0.75	1.21	.	0.82
FI	.	0.53	1.30	1.38	2.43	2.43	2.43	4.68	0.82	27.82	1.90
SE	14.80	1.24	0.38	.	2.78	2.84	2.38	3.81	0.98	5.65	1.07
UK	8.12	5.99	8.06	0.12	8.77	8.29	8.17	8.40	8.43	0.38	9.42
NO	0.74	2.37	0.21	.	8.34	6.73	7.98	1.69	0.42	.	1.44

Unweighted results. Share of blank answers (or incorrect 9) of all eligible answers according to the relevant filter (this value refers to the processed file and not necessarily the original target group).

The calculation method described above does not capture the magnitude of item non response in case of imputation. For example France, Malta, Slovenia used imputation for some of the variables, Austria for all variables.

Within the evaluation process the countries were asked to provide information about reasons for high item non-response. The Table below summarize the comments (by variable).

Table 4: Reasons for high item non-response

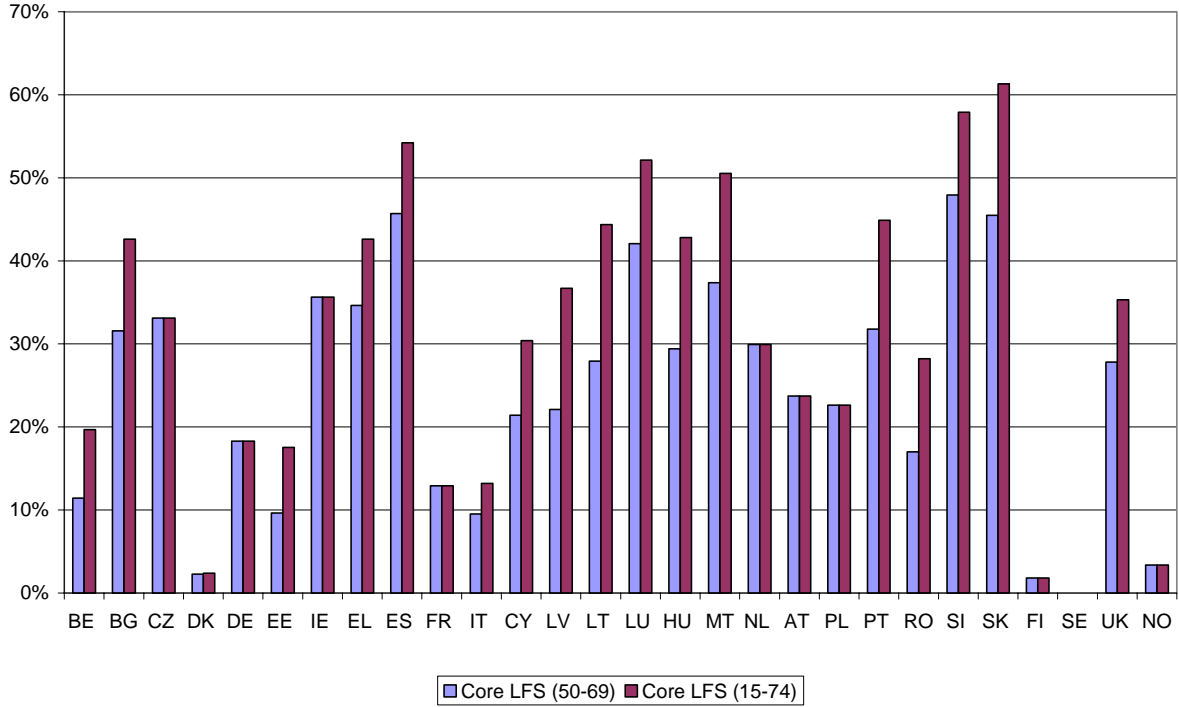
Country	Explanation
Col.240 (REDUCHRS, Person reduced working hours)	
BG	Not included in the national questionnaire. Progressive retirement scheme and part-time pension are not available in our country
DE	No explanation for high non response, maybe it is a very sensitive and/or difficult variable which should not be surveyed anymore. Variable is not suitable for proxy-interviews.
SI	No explanation for high non response,
SE	No explanation for high non response,
UK	There are 2 reasons for the high level of item non-response. Firstly, there were 1420 cases where the respondent did not complete an interview in the AJ06 quarter but remained in the dataset because they took part in the previous quarter. These people were not asked the ad hoc module questions and therefore appear as blanks. The second reason is that the "Before stopping all paid work, did you reduce your working hours or take a part-time job in a move towards full retirement" was not asked of the 327 retired people who were exactly 50 years old when they last worked. People who retired over the age of 50 were, however, correctly routed to this question.
Col.241/242 (PLAGESTP, Planned age for stopping all work)	
DE	Normal non response-rate; provision of information is voluntary! Variable is unsuitable for proxy-interviews.
LV	In Latvia question "At which age do you plan to stop all work for pay or profit?" was asked only to employed persons.
Col.243 (STATAFT, Main labour status after job)	
DE	Normal non response-rate; provision of information is voluntary!
NL	For persons who have started in their last job less than 2 years ago it is only known if they stopped because of VUT/pension, so it is not asked after the exact reason. Those persons are coded blank. From January to December 628 of the 633 concern such cases. So for almost all blanks the exact labour status after leaving the last job is not known although it is known that it was not "retirement or early retirement".
Col.245 (FLEXWORK, Flexible working time arrangements)	
DK	No explanation for high non response.
DE	Normal non response-rate; provision of information is voluntary!
IE	No explanation for high non response.
EL	Probably it was not easy for people to answer what they would do in a "hypothetical" situation, especially if they did not have thought about it before. An indication that this was a problem is that the "combination" of the answers in the three questions (Col. 245, Col.246 and Col.247), non response rate is about 8%-that is, many people have an idea about one or two of the factors, but not for all.
ES	There are 1815 records that appear in blank. From them, 1788 correspond to "Doesn't Know" answers and the 27 remainder correspond to records that, as we explain in the final report, have no information in the module variables due to the fact that the filter conditions were modified subsequently to collection as a result of survey editing to eliminate inconsistencies between variables.
FR	This question was not put to people who had lost their last job (lay-off, bankruptcy) because it led to tricky situations during the first test of the questionnaire. Apart from that (942 persons), the non-response rate is rather satisfactory: 0.7%.
Col.246 (OPPSKILL, Opportunities to update skills)	
DE	Normal non response-rate; provision of information is voluntary!
IE	No explanation for high non response.
EL	Probably it was not easy for people to answer what they would do in a "hypothetical" situation, especially if they did not have thought about it before.
ES	There are 1601 records that appear in blank. From them, 1574 correspond to "Doesn't Know" answers and the 27 remainder correspond to records that, as we explain in the final report, have no information in the module variables due to the fact that the filter conditions were modified subsequently to collection as a result of survey editing to eliminate inconsistencies between variables
Col.247 (HLTHSAF, Health/safety at workplace)	
DE	Normal non response-rate; provision of information is voluntary!
IE	No explanation for high non response.

EL	Probably it was not easy for people to answer what they would do in a "hypothetical" situation, especially if they did not have thought about it before.
Col.248/249 (AGEPENS, Age to start retirement pension)	
DE	Normal non response-rate; provision of information is voluntary!
Col.250 (OTHBENF, Other pensions/benefits)	
DE	Normal non response-rate; provision of information is voluntary!
EL	Questions of financial character (additional income, etc) are not easily answered by people.
IT	Item 3 of this variable is the result of a mix of previous variables.
Col.251 (FININCTV, Financial incentive to stay at work)	
DE	Difficult question with difficult answers, unsuitable for proxy-interviews.
IE	No explanation for high non response.
FR	This question was not put to people who were working AND receiving a retirement pension, hence the missing values.
FI	The high non-response in this variable consists mostly of persons receiving part-time pension. FI didn't ask about the main financial incentive to stay at work if a person was receiving a part-time pension. FI saw part-time pension as a mean to shorten one's working hours and change from full-time work to part-time work. FI didn't consider part-time pension as an option for non-employment (retirement included). As most people work to earn their living, we first considered to impute code '2' (to provide sufficient household income) for all part-time pension receivers. At the end FI decided to leave them blank in this variable.
Col.252/253 (YEARSPT, Number of working years)	
DE	Normal non response-rate; provision of information is voluntary! Unsuitable for proxy-interviews.
ES	There are 1604 records that appear in blank. From them, 1577 correspond to "Doesn't Know" answers and the 27 remainder correspond to records that, as we explain in the final report, have no information in the module variables due to the fact that the filter conditions were modified subsequently to collection as a result of survey editing to eliminate inconsistencies between variables
PL	Considering the fact that we would like to reduce burdening our respondents with a large number of additional questions, in the Polish version of the ad hoc module we resigned from asking the questions about "the number of years spent in work for pay or profit (during working life)". Information concerning this variable is taken from the questions included in the ZD questionnaire. A high level of non-response rate is in this case caused by the fact that in the Polish Labour Force Survey questions regarding "the number of years spent working" did not concern the persons who have not worked for 8 years or longer.
UK	There are 2 factors that account for the high level of non-response. Firstly, there were 1420 cases where the respondent did not complete an interview in the AJ06 quarter but remained in the dataset because they took part in the previous quarter. These people were not asked the ad hoc module questions and therefore appear as blanks. The second reason is that the appropriate question was not asked of the 327 retired people who were exactly 50 years old when they last worked. People who retired over the age of 50 were, however, correctly routed to this question.

Proxy interviews

The number of proxy interviews is a criterion for the quality of a survey. A comparison of the unweighted shares of proxy-interviews for the target group of the ad hoc module with the share calculated for the overall core LFS shows significantly lower shares for the ad hoc module target group. Due to the fact that the specific age class of the ad hoc module consists of older persons (50-69) which are easier to reach, this result is not surprising. Generally low shares of proxy-interviews improve the overall quality of surveys. Although the share of proxies for the ad hoc module target group is lower some of the countries still reach shares ranging from 20 to 40 percent. A further reduction will be highly desirable, especially given the fact that some of the variables measure attitudes.

Figure 1: Share of proxy interviews



Note. Unweighted shares are calculated by using variable PROXY which measures number of proxy-interviews in the core LFS (2006 data). For ES, UK, NO the target population is 16-74.

Accuracy

With the exception of Ireland and Luxemburg all counties provided information about the relative standard error (coefficient of variation) for selected variables. Due to the reason that for the variable Col.240 (REDUCHRS,- Person reduced working hours) some countries didn't used all response items the relative standard errors are incomplete. Note, the relative standard errors has been reformulated in terms of confidence limits for the statistics in question, in order to provide better clarity to the reader.

Table 5. Estimates and confidence limits, at a level of confidence of 95%, for selected number of statistics in the EU-LFS AHM 2006

	Number of persons aged 50 to 69 which reduced working hours in a progressive retirement scheme/part-time pension (C240 = 1) (in thousand)		Average planned age for stopping all work for pay or profit (C241/242)		Number of persons aged 50 to 69 which receive a disability pension or a sick pension (C250 = 1) (in thousand)	
BE	70.1	±11.9	62.0	±0.21	48.0	±9.7
BG	n.a.		63.0	±0.12	68.7	±7.6
CZ	n.a.		61.7	±0.01	82.1	±6.1
DK	20.4	±5.3	63.10	±0.12	47.2	±8.2
DE	1,138.3	±77.5	63.7	±0.08	138.5	±26.3
EE	n.a.		65.0	±2.29	9.4	±2.1
EL	n.a.		59.0	±0.001	33.4	±4.5
ES	44.6	±10.5	63.4	±0.09	248.6	±23.0
FR	350.5	±12.7	60.2	±3.34	152.5	±5.1
IE	n.a.		n.a.		n.a.	
IT	16.8	±5.4	63.4	±0.06	178.7	±17.4
CY	n.a.		64.4	±0.15	2.9	±0.9
LV	1.2	±1.3	63.0	±0.35	8.6	±4.2
LT	6.2	±3.5	62.7	±0.25	40.3	±8.8
LU	n.a.		n.a.		n.a.	
HU	n.a.		61.0	±0.10	97.2	±7.8
MT	2	±0.7	60.0	±0.24	2.5	±0.7
NL	130	±8.2	63.0	±0.14	60.0	±5.8
AT	58.7	±7.9	61.0	±0.11	59.8	±7.0
PL	n.a.		62.0	±0.15	362.8	±31.0
PT	n.a.		n.a.		119.2	±12.1
RO	29.2	±8.9	64.1	±0.13	171.3	±17.8
SI	12.4	±2.3	60.0	±0.31	16.1	±2.8
SK	n.a.		63.0	±0.15	30.3	±4.3
FI	71.8	±6.5	63.0	±0.09	78.8	±6.3
SE	25.9	±6.6	64.3	±0.05	42.3	±7.5
UK	54.2	±10.3	63.0	±0.06	n.a.	
NO	82.6	±8.9	63.9	±0.88	100.7	±12.2

Timeliness and punctuality

According to Commission Regulation (EC) No 246/2003 of 10 February 2003 on a multi-annual program of ad hoc modules 2004-2006, the deadline for the transmission of results of the ad hoc module 2006 was 31 March 2007. Of the 28 participating countries, 27 delivered the data on time while Ireland transmitted the data files later.

Some of the countries sent revisions after the initial transmission. Initial validation of the data sets was finished in October 2007. Due to the work of the Task Force a second round of validation was initiated in December with revised files from some countries transmitted in February 2008.

Accessibility and clarity

Results based on the data from the ad hoc module 2006 will be published in the Series "Statistics in Focus". These are publicly available on the web-site of Eurostat. Some countries have already published results. For example, the National Statistical Institutes of Belgium, Spain² and Finland published the main results on national

² The information on the ad hoc module in Spain is provided on the web page http://www.ine.es/jaxi/changeLanguage.do?target=menu&download=0&multi=0&type=pcaxis&file=inebase&print=1&page=menu&N=&path=/t22/e308_mnu&language=1

level. Some other countries analyze the data in 2008. Typically, these documents are available on the internet site of the National Statistical Institutes.

Results will be in Eurostat Database by the end of 2008. All data published on the Eurostat web-site have meta-data in the standard format of the IMF (SDDS). It is also possible to request customised frequency tables and limited cross-tabulations sets directly from Eurostat without charge.

Consistency

Due to a lack of comparable data sets in Europe it was not possible to check the consistency of the ad hoc data set at all

6 Implementation, cross country comparability and recommendations for the repetition of the module

On overall most of the Member states reported problems while implementing the module. The more general remarks for the ad hoc module were:

- There is a complex national legislation behind the issue of retirement, which has to be known for the analysis of the module.
- The ongoing reform process in some member states leads to problems to develop an appropriate questionnaire.
- There are problems with the definition of some key variables. For example persons can not easily distinguish “retirement” pensions from other pension schemes.
- Some of the variables were not appropriate for person's older persons (older 65 years) and long term unemployed persons.
- Some of the filters were too complicated filters, especially hard to apply in paper questionnaire.

Several countries suggest improvements or changes in case of repetition of the ad hoc module. Some of these are of a rather general nature (and could be applied in any ad hoc module):

- To avoid hypothetical questions.
- To use the principle “1 question per variable”.
- Do not accept proxies.
- Get information on financial situation from registers.
- To test not only variables but also answering codes before adopting regulations.
-

Concerning the particular module it was suggested that:

- The lower age limit (for the time that people worked for the last time) should be less than 49.
- The module should be more “balanced” between self-employed and employees.
- Age class limits should be different to usual retirement ages, like 60 or 65.
- To use an “open answer” category or to include individual factors for FLEXWORK (flexible working time arrangements), OPPSKILL (opportunities to update skills) and HLTHSAF (health/safety at workplace).
- To avoid questions on future plans.
- To avoid posing a question about future job in persons not in employment.
- To omit variables OTHBENF (Other pensions/benefits) and YEARSPT (Number of working years) because they are difficult to answer.

The specific remarks and recommendations by variables are summarized in the following paragraphs.

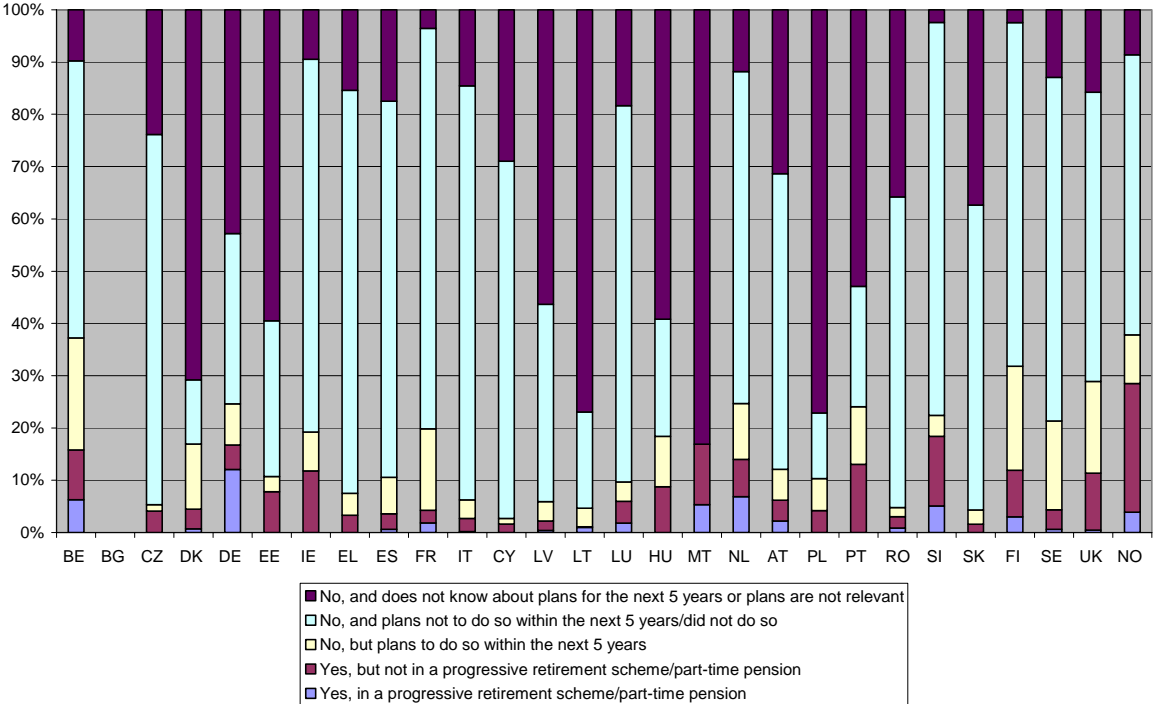
REDUCHRS (Col.240) "reduction of working hours in a move to full retirement"

With respect to the implementation of this variable a lot of countries (CY, DK, ES, FI, FR, GR, HU, LV, PL and UK) split the questionnaire into employed and not employed. Then they asked each group questions aimed specifically for their situation. In this context some countries pointed out that the variable is maybe not appropriate for long term unemployed persons.

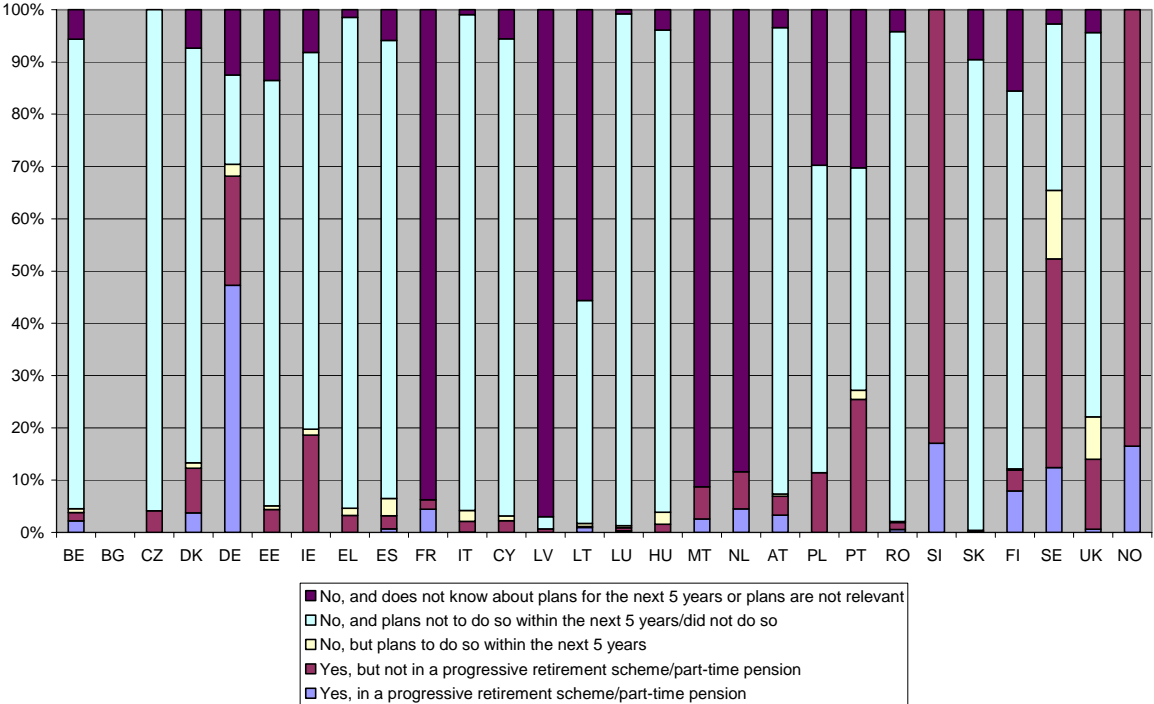
Two main issues were reported on REDUCHRS. On the one hand, future plans were often not known, especially in case of changing legislation. It would make more sense to ask about real options for the next module. On the other hand, the response item “Yes, in a progressive retirement scheme/part-time pension” was not used in several countries due to the non-existence of the underlying scheme. For a repetition of the module, the variable should be simplified and the explanatory notes should include more practical examples for a better understanding. It might also be sensible to split the respondents into employed and unemployed.

The figures below show the main distribution within the countries for the groups of employed (Figure 1) and not employed persons (Figure 2). The table below provides some additional information by the National Statistical Institutes about the reasons for atypical patterns.

Distribution AGEPENS for employed persons (WSTATOR=1,2)



Distribution AGEPENS for not employed persons (WSTATOR=3,5)



Country	Item	Employment status	Problem	Reason
DE	1	3,5	Comparatively high frequencies	Part-time pension does play an important role in Germany.
SI	1	3,5	Only item 1	The fact is that the progressive retirement scheme in combination with a part-time pension is not very widely spread in Slovenia so far. There are still a lot of cases when employees are forced to go into early retirement (they are unemployed for two years and then they proceed into retirement); this is a 'soft version of being laid-off'. In fact the figures SI got are not strange since they haven't reached that level that the employers would ask employees to prolongs their staying at work.
DK	5	1,2	Comparatively high frequencies	The high frequency may be caused by the fact that DK have coded some respondents as code 5, who should in fact have been coded 4? These are the respondents who have not reduced their working hours in a move to full retirement, and who do not plan to reduce their working hours have been coded 5. The difference between code 4 and code 5 is unclear to DK. Furthermore the Danish question on reduction of working hours in a move to full retirement to those respondents who are unemployed may not have been completely clear.
EE	5	1,2	Comparatively high frequencies	Part-time work/reduced working hours in a move to full retirement is not usual in Estonia and lot of respondents say that they can not do such plans as it is not possible anyway (coded as 5)
FR	5	3,5	Comparatively high frequencies	For people not employed when being asked the ahm, all answers 'no' were assigned to option '5', with no distinction of the situation (options '3' and '4' were not proposed).
HU	5	1,2	Comparatively high frequencies	People are not interested in reducing working hours before retirement. On the one hand they do not want and cannot afford to reduce their income; on the other hand if they earn less their pension will be lower for the amount of the old-age pension depends on the recognised length of service and on the average monthly earning taken into account.
LT	5	1,2	Comparatively high frequencies	According to the provisions of the Lithuanian law on Pensions, a person willing to earn a higher retirement allowance, should not reduce the number of working hours, especially this applies to persons close to the retirement age, because if they do so, they would receive a lower salary and his retirement allowances will be calculated on the basis of this lowered salary which in it's turn results in lower pension. Because of this reason the majority of the respondents chose this answer to this variable.
LV	5	All	Comparatively high frequencies	Reducing of working hours before moving to full retirement in Latvia is used only in few cases. Mostly situation is opposite - people are choosing to work more hours to provide sufficient household income and/or to increase retirement pension.
NL	5	3,5	Comparatively high frequencies	About half of these persons stated that they did not reduce hours before retirement. And about half indicated not have stop working because of retirement but for other reasons. So for these persons the question was not relevant and therefore not asked.
PL	5	1,2	Comparatively high frequencies	A relatively large number of this category is due to the specific character of the Polish labour market - mainly a low level of retirement pensions and uncertain

PT	5	1,2	Comparatively high frequencies	tendency of their shaping in the future. In fact, from those individuals, 52.6% were employed and 30% were not employed. PT is not sure about the reasons why so many persons have no plans to reduce working hours; maybe it is not a common situation in the country, or in the actual conditions of the Portuguese labour market.
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The Task Force pointed out that some of the results are maybe driven by the age of the respondent and the sector of economic activity. In addition different patterns were expected for self-employed persons. Due to the reason that the retirement systems face some adjustments (reforms) and persons have to work longer, one can expect that younger persons and self employed persons tend to answer by choosing response item 5 (No, and does not know about plans for the next 5 years...). The analysis (not presented here) shows for some countries that not employed younger persons (50-59) used response item 5 significantly more frequent. The question is maybe less relevant for younger persons. For self employed persons the descriptive analysis didn't show any significant differences to employees. With respect to the influence of the industry on the response behaviour the first descriptive analysis didn't provide evidence for any bias.

PLAGESTP (Col.241/242) "planned age for stopping all work for pay or profit"

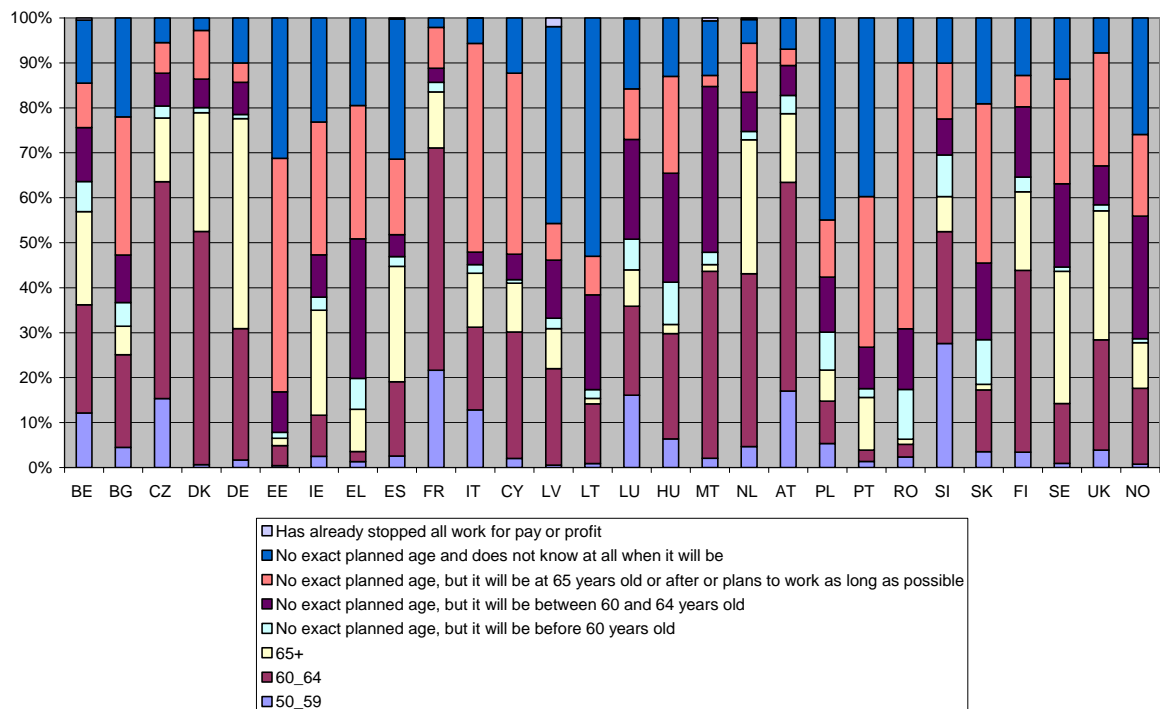
For the implementation several countries (BG, CY, DK, ES, FI, GR and SK) chose to ask for the information to employed persons and not employed persons separately. The other countries (AT, BE, CZ, EE, HU, IT, LT, LV, PL, PT and UK) adopted a different approach asking together both groups.

Some countries pointed out that the variable is not appropriate for older persons as well as persons not working but wanted to work. Furthermore, some countries stressed that changes in legal frameworks of social security systems affect (and change) the plans of respondents (same issue as for the variable REDUCHRS). For the repetition of the module the variable should exclude persons who are already in retirement. But this needs a clarification of the concept of retirement by either introducing a variable or more precise instruction within the Explanatory notes.

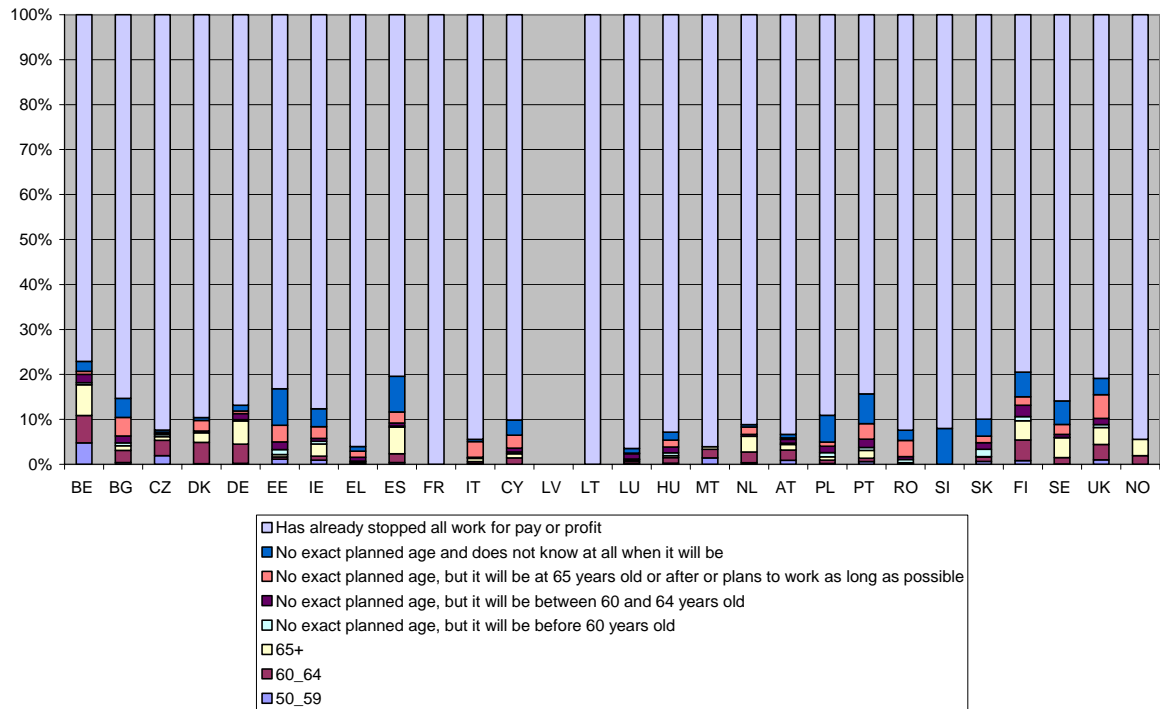
For the coding it could be better to have only age classes instead of the precise year and to be more precise on the wording for the code 96. It should be clear whether "as long as possible" means "legally" or "physically".

The figures below show the main distribution within the countries for the groups of employed (Figure 1) and not employed persons (Figure 2). The first graphical analysis shows only minor atypical patterns.

Distribution PLAGESTP for employed persons (WSTATOR=1,2)

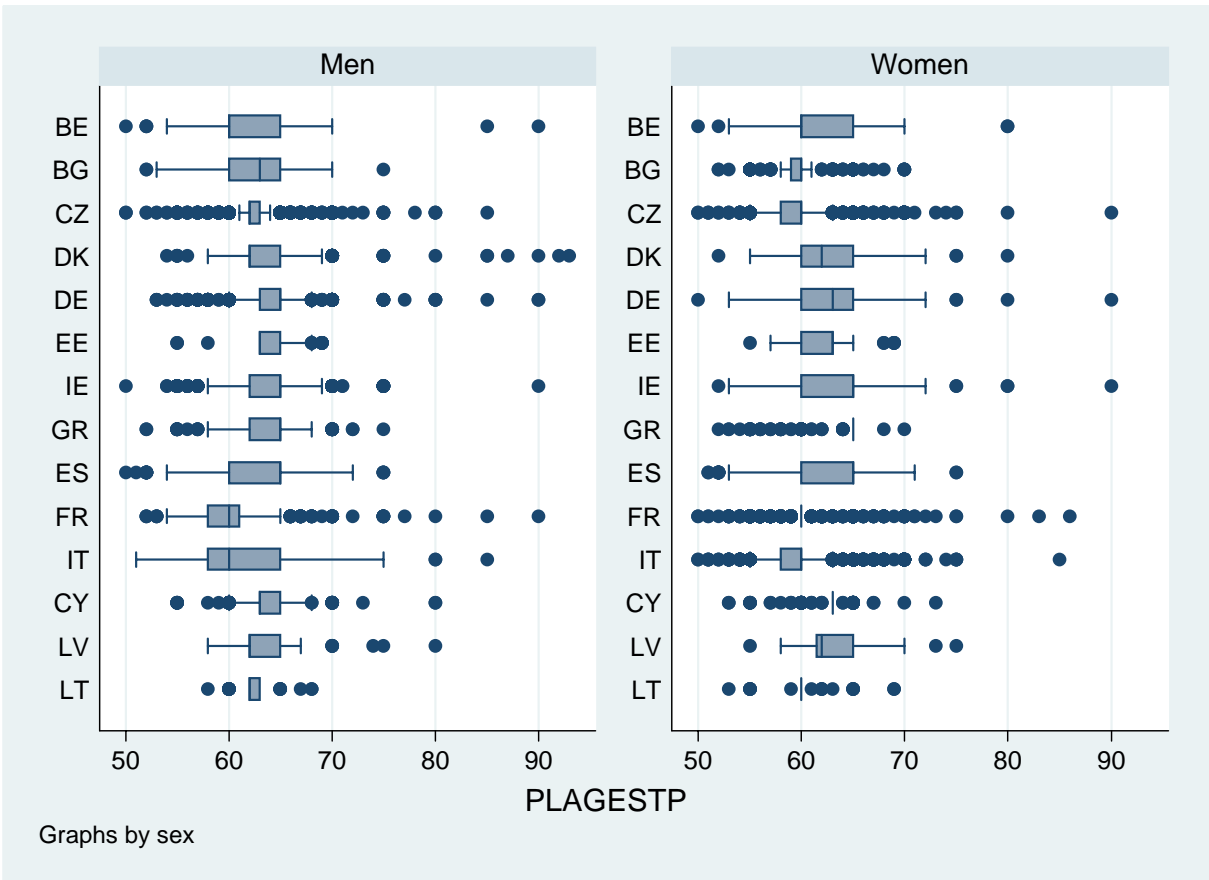
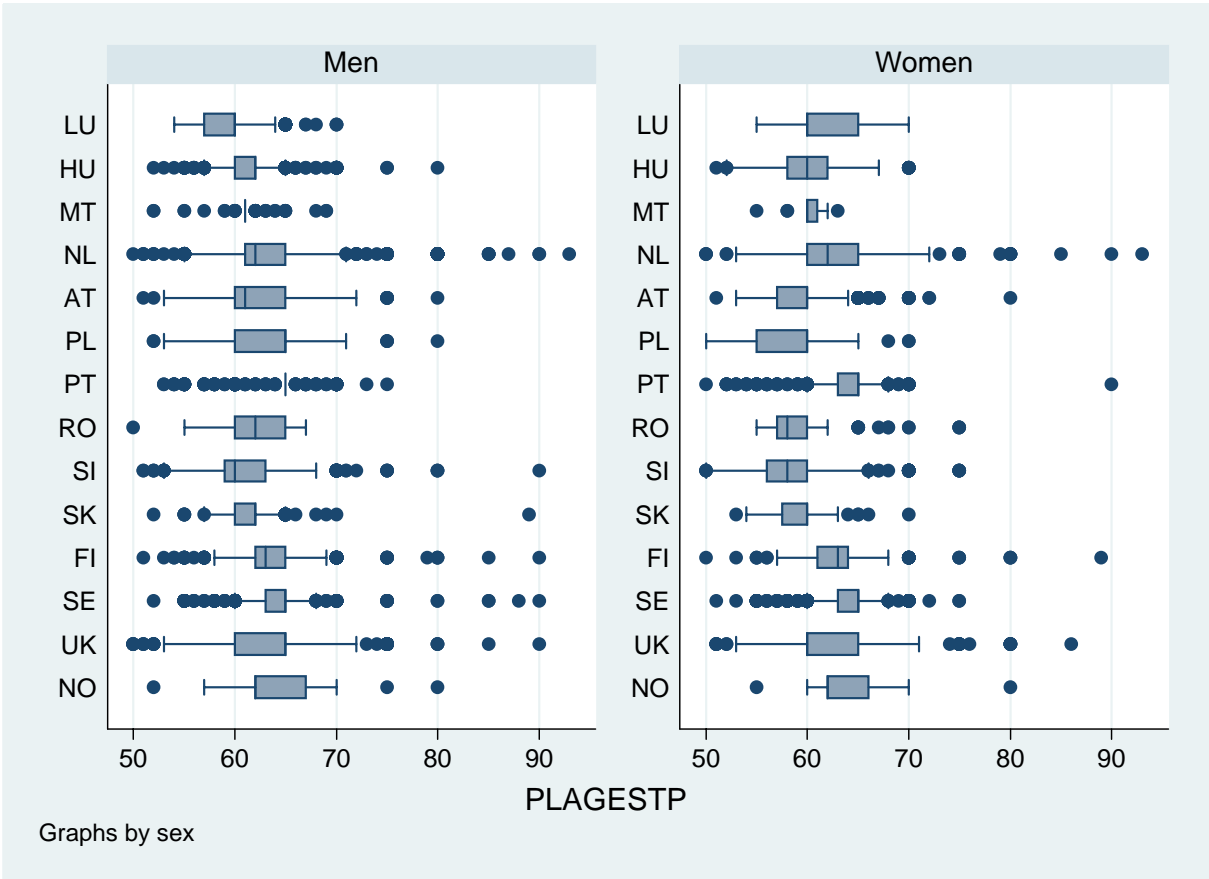


Distribution PLAGESTP for not employed persons (WSTATOR=3,5)



Country	Item	Employment status	Problem	Reason
LV	98	1,2	Item doesn't make sense	No explanation
MT	98	1,2	Item doesn't make sense	No explanation

For the evaluation the Task Force members suggested to analyze whether age, sex and the professional status affected the results. The descriptive analysis (not presented here) showed that younger employed persons do not tend to have more precise plans and self employed persons tend to work longer without precise plans. The distribution of the variables is reported in the graphs below.



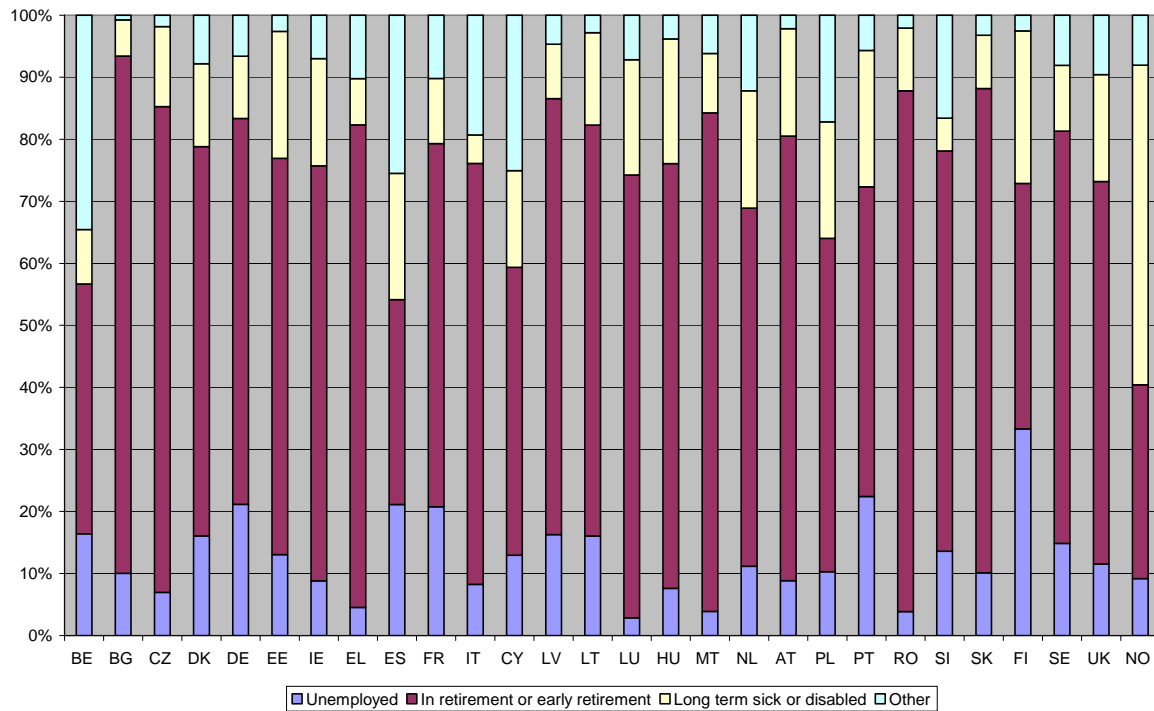
Note: Figures above show horizontal box plots. The graphs show the median, the upper 25 percentile, lower 25 percentile, upper and lower adjacent values as well as outside values. Distribution is calculated for all persons which stated a 2-digit planned exit age (PLAGESTP<94).

STATAFT (Col.243) "Main labour status just after leaving last job or business"

The implementation of the variable faced no major problems. Most countries asked the question as it was proposed in the specification of the module. Only some countries (AT, BG, GR, IE, IT and PL) included due to the national conditions one or more extra options or very slight variations. With respect to the problems only a minor comment was given: the similarity of the question of the core LFS "Main reason for leaving last job" and the confusion that it may imply for interviewees.

The figure and table below shows the main distribution within the countries and the reasons for atypical patterns.

Distribution STATAFT



Country	Item	Employment status	Problem	Reason
DE	1	all	Comparatively high frequencies	Unemployed older than 50 (55) often do not succeed in becoming integrated into the labour market again.
ES	1	all	Comparatively high frequencies	One possible explanation would be that the respondents who left their last job not voluntarily describe as themselves as unemployed, even if they didn't fulfil the conditions of unemployment, according to the LFS definitions.
FI	1	all	Comparatively high frequencies	In the nineties, there was a deep recession in Finland. The unemployment rate was at it's highest at 16.6 in 1994 and it was over 10 all the years 1992-1999 and still quite high in 2000's. So, truly, unemployment was main labour status just after leaving last job or business for so many non-employed 50 to 69 years old in Finland.
FR	1	all	Comparatively high frequencies	May be due to the declarative aspect of the question.
PT	1	all	Comparatively high frequencies	According to the results of the national LFS, the individuals above 50 years old classified as unemployed have high frequencies.
BG	2	all	Comparatively high frequencies	From 3648 persons (C243=2) 3248 had reached compulsory retirement age (in 2006 63 years of age for men and 58.5 years of age for women, this age is lower for some professions) and receive individual retirement pension.

NO	3	all	Comparatively high frequencies	That is the case for Norway.
BE	4	all	Comparatively high frequencies	The reason is that BE added an important category 'bridging pension' and since this category was not foreseen by Eurostat, BE have added the results of this category to the results of 'other'. The frequency for our item 2 'bridging pension' is 25.5%. The real frequency for 'other' (item 5 in national questionnaire) is 9.3%.

The Task Force discussed a possible correlation between the age of the respondent and their answers. The more detailed analysis (not presented here) showed that in some countries younger persons (aged 50-54) are more frequent unemployed and older persons (aged 60-69) are more frequent in retirement or early retirement. The possible analysis of this variable is quite limited. The variable could be cross tabulated with structural variables like sex, age and education. Detailed information on the labour market participation (e.g. sector of activity and occupation) is restricted on persons which started their retirement less than 8 ago. For the repetition of the module this should be taking into account.

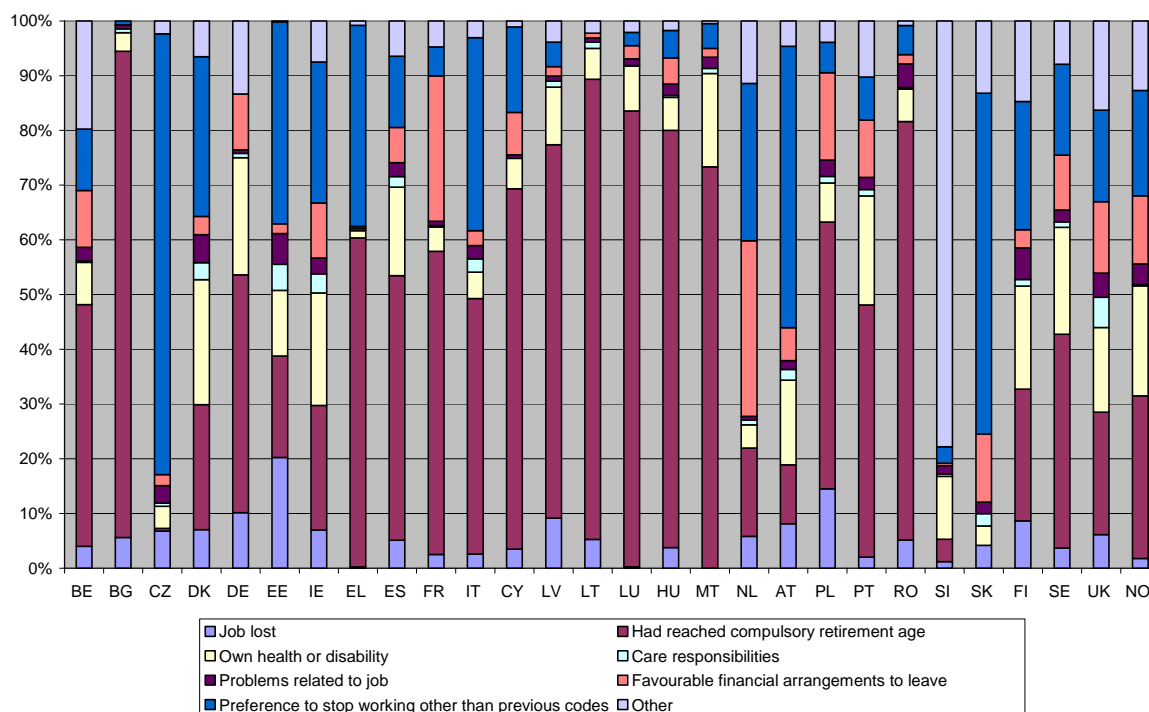
REASRET (Col.244) "main reason for retirement or early retirement"

The implementation seems to be without major problems because respondents could easily be filtered from the previous question. As for STATAFT, most countries asked the question as proposed in the specification of the module. Only some countries (AT, BG, CZ, ES, FR, GR, HU, IT, PL and SL) included one or more extra options or very slight variations in order.

With respect to the problems some countries pointed out that the response items were too detailed and a few of them not very appropriate. For example, some countries faced difficulties to distinguish between item 7 "Preference to stop working other than previous codes" and item 8 "Other". As for item 2, there were misunderstandings between compulsory and legal age of retirement (some counties used in the questionnaire the standard retirement age instead of the compulsory retirement age).

The figure and table below shows the main distribution within the countries and the reasons for atypical patterns.

Distribution REASRET



Country	Item	Employment status	Problem	Reason
FR	6	all	Comparatively high frequencies	In order to reduce unemployment of older persons, French authorities developed public pre-retirement programs in the 1970's. Moreover, pre-retirement schemes were also made available within the firms (private pre-retirement schemes). The access to pre-retirement schemes was limited in the 1990's and after the 2003 pension reform.
NL	6	all	Comparatively high frequencies	This is just the result of an answer to the direct question on the most important reason to retire. There is no reason to doubt these results. It is probably an adequate reflection of the reality.
CZ	7	all	Comparatively high frequencies	The code 2 was seen as risky to be misunderstood as there are very few professions where the maximum age is defined and the employer usually offers another job (that is without age limit) to such worker. Vice-versa the most frequent reasons for leaving is attainment of retirement age when the leaving is possible. Therefore there is an extra code 1 "Attainment of retirement age" in national questionnaire. For this reason they were only low frequencies in code 2, but they were high frequencies in code 7 (this code includes "Attainment of retirement age")
SK	7	all	Comparatively high frequencies	According to the explanatory notes, the item 7 also included persons who reached the minimum or standard retirement age, so it is a main reason why the item 7 was very frequent answer.
SI	8	all	Comparatively high frequencies	High frequencies are due to persons who have fulfilled the requirements for the retirement and they were classified among 'the other' since we didn't know where to put these persons.

The more detailed analysis (not presented here) of this variable showed a correlation to the age of the respondent. In some countries younger persons (aged 50-54) answered more frequent that "voluntary reasons" are the main reason for retirement or early retirement. Meanwhile "job related problems" seem not to be the main reason for retirement or early retirement.

FLEXWORK (Col.245) "flexible working time arrangements)"

OPPSKILL (Col.246) "opportunities to update skills"

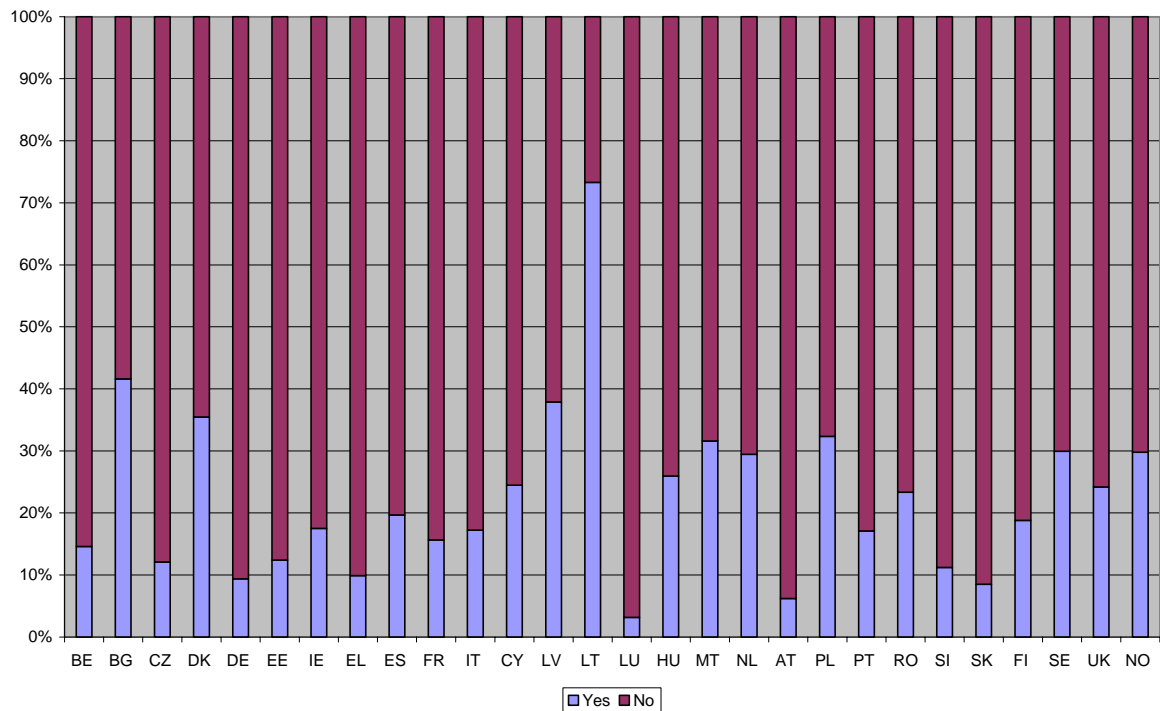
HLTHSAF (Col.247) "health and/or safety at workplace"

These variables were discussed together because of their similarity. For the implementation of these variables some countries asked only one question (AT, BG, EE, FI and HU). Some countries (BG, CY, DK, EE, ES, FI, FR, GR, NO, RO, SE, SI and SK) distinguished all variables of the questionnaire for employed persons and not employed persons.

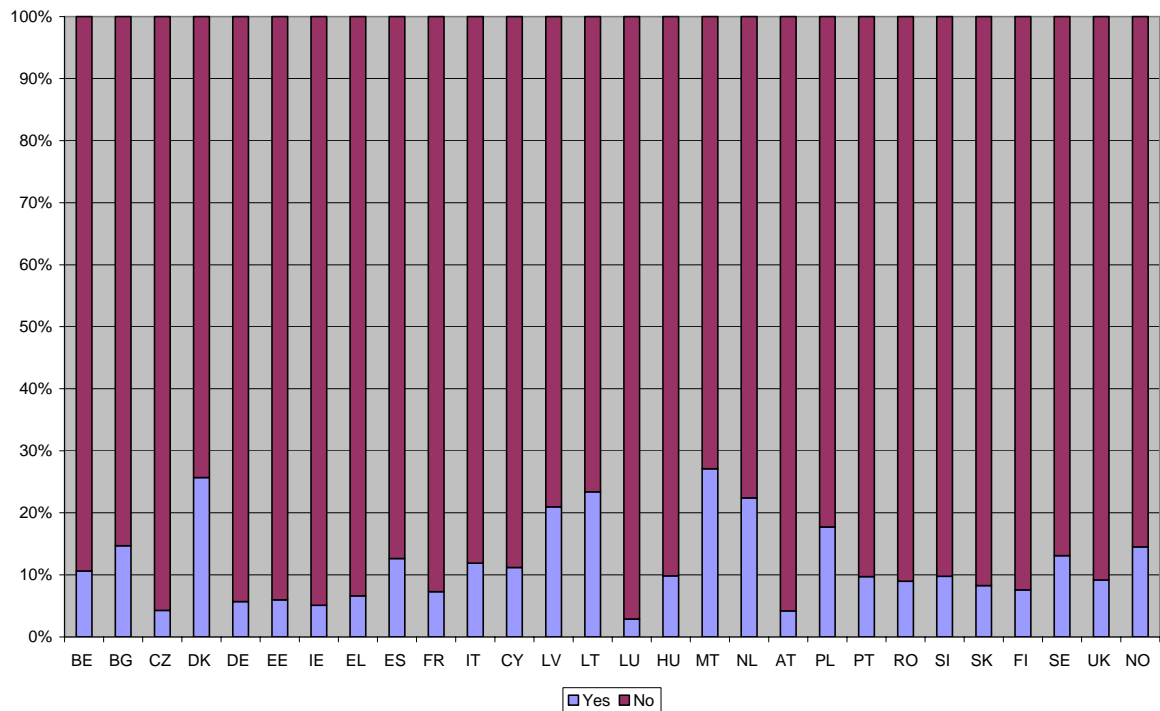
Similar problems were reported for the three variables providing information on a possible/actual longer stay at work. Firstly, the variables are not relevant for unemployed persons, self employed persons and people in early retirement due to redundancy. The most interesting group are those who would like to stop earlier than the standard retirement age. Secondly, the kind of labour market flexibility addressed by variable FLEXWORK does not exist in all countries, especially not in Eastern Member States. Thirdly, the three variables are maybe too hypothetical. For the repetition of the module, one option could be to ask only one question about the "main factors" which contribute to a longer stay at work.

The figures below show the main distribution within the countries for the groups of employed and not employed persons. In addition, tables providing the information about the reasons for atypical patterns.

Distribution FLEXWORK for employed persons (WSTATOR=1,2)



Distribution FLEXWORK for not employed persons (WSTATOR=3,5)



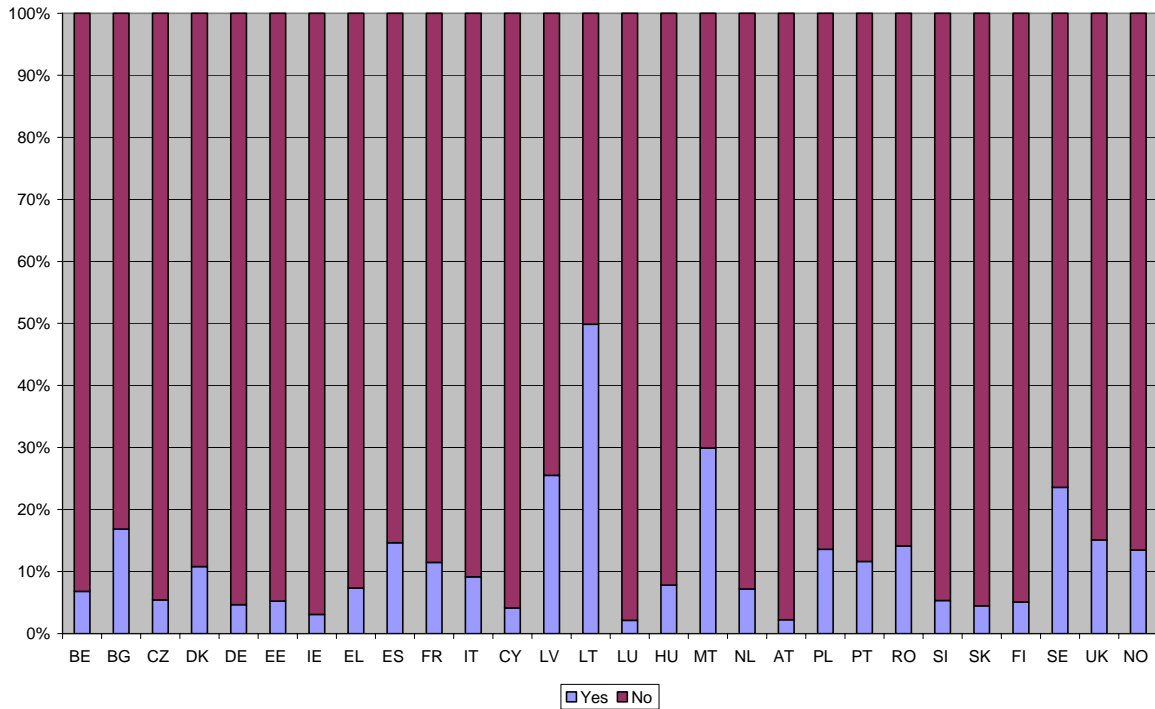
Country	Item	Employment status	Problem	Reason
BG	2	1,2	Comparatively low frequencies	These variables express the subjective assessment of interviewees about working factors that could contribute to them staying longer at work and under the conditions in BG these factors are more substantial than others.
LT	2	1,2	Comparatively low frequencies	As far as the questions Col.245, Col.246 and Col.247 are concerned in which a majority of respondents answered that neither opportunities to update skills nor

better health safe conditions would not be a stimulus encouraging to continue working, it is because they had never dealt with that type of situation in reality. In majority cases the respondents are complaining about their age as being a disadvantage because an employee would always prefer a younger worker instead of creating better working conditions for a person of the retirement age.

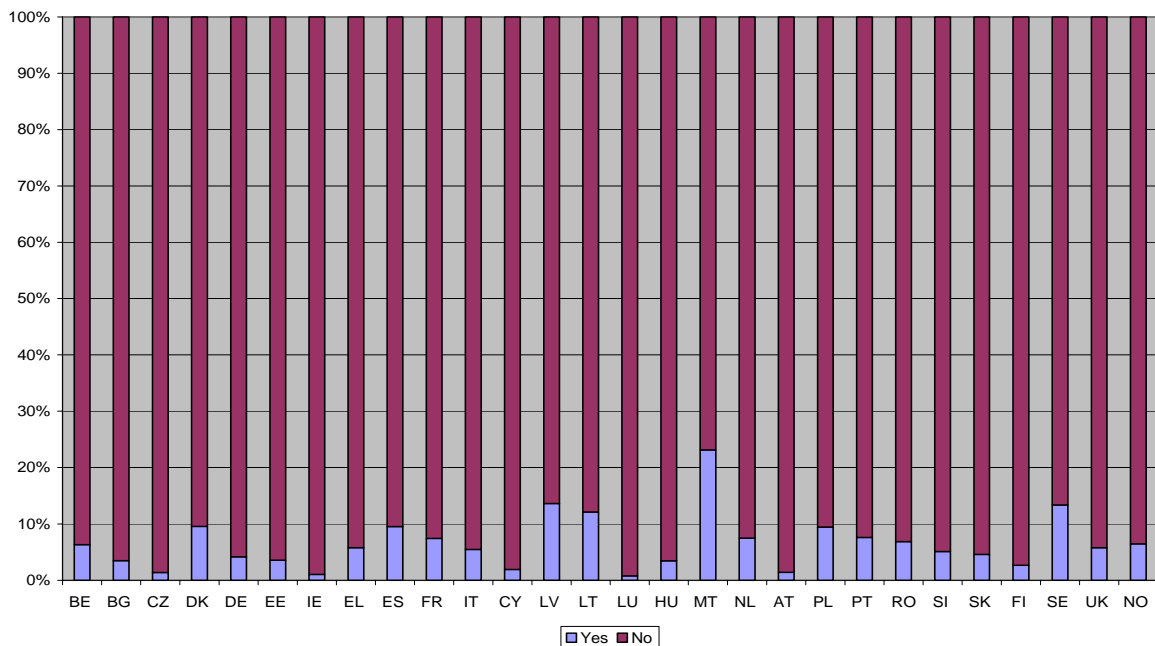
LV 2 1,2 Comparatively low frequencies

Because in Latvia working hours were generally not reduced, more flexible working time arrangements contribute persons stay longer at work after retirement age.

Distribution OPPSKILL for employed persons (WSTATOR=1,2)

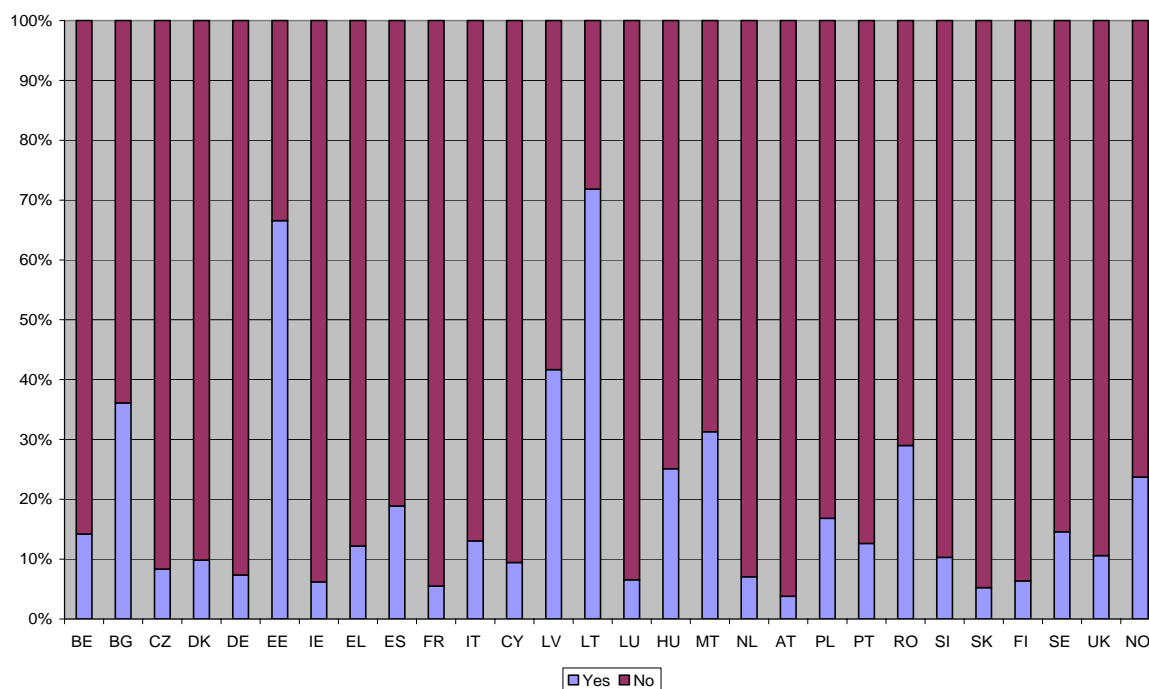


Distribution OPPSKILL for not employed persons (WSTATOR=3,5)

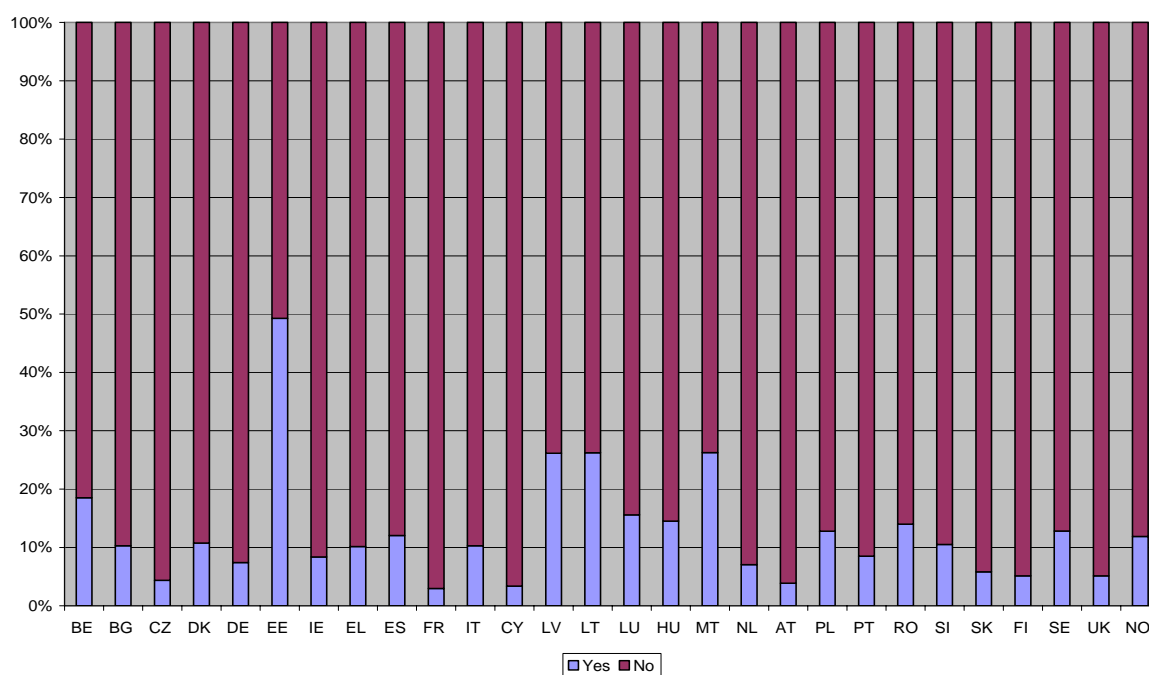


Country	Item	Employment status	Problem	Reason
LT	2	1,2	Comparatively low frequencies	Same as for FLEXWORK.
LV	2	1,2	Comparatively low frequencies	If person after retirement age wants to stay in labour market as long as it is possible (because of small pensions in Latvia) more opportunities to update skills is important to compete with younger persons in labour market.
MT	2	1,2	Comparatively low frequencies	No specific explanation.

Distribution HLTHSAF for employed persons (WSTATOR=1,2)



Distribution HLTHSAF for not employed persons (WSTATOR=3,5)



Country	Item	Employment status	Problem	Reason
BG	2	1,2	Comparatively low frequencies	Same as for FLEXWORK.
EE	2	1,2 and 3,5	Comparatively low frequencies	No clear explanation for this, just some suspicions. In 2006 questionnaire EE had health module (for national purposes) just before ad hoc module. Perhaps respondents with health problems had their health "more in mind" then answering to Col.247 compared to other countries there no health questions were asked before. Also, as in Estonia the share of persons with longstanding health problems is quite high compared to other countries (according to the results of ad hoc module 2002), we have potentially more people who may answer 'yes' to Col.247.
LT	2	1,2	Comparatively low frequencies	Same as for FLEXWORK.
LV	2	1,2	Comparatively low frequencies	If person wants to work as long as possible it's important to have good health. Different health protection programs and/or safety at workplace provide better health conditions that give possibilities to stay longer in labour market.

The more detailed analysis (not presented here) of this variable by the economic activity (NACE1D) and the occupation (ISCO1D) of the respondent didn't show statistically significant deviations for the analysed groups.

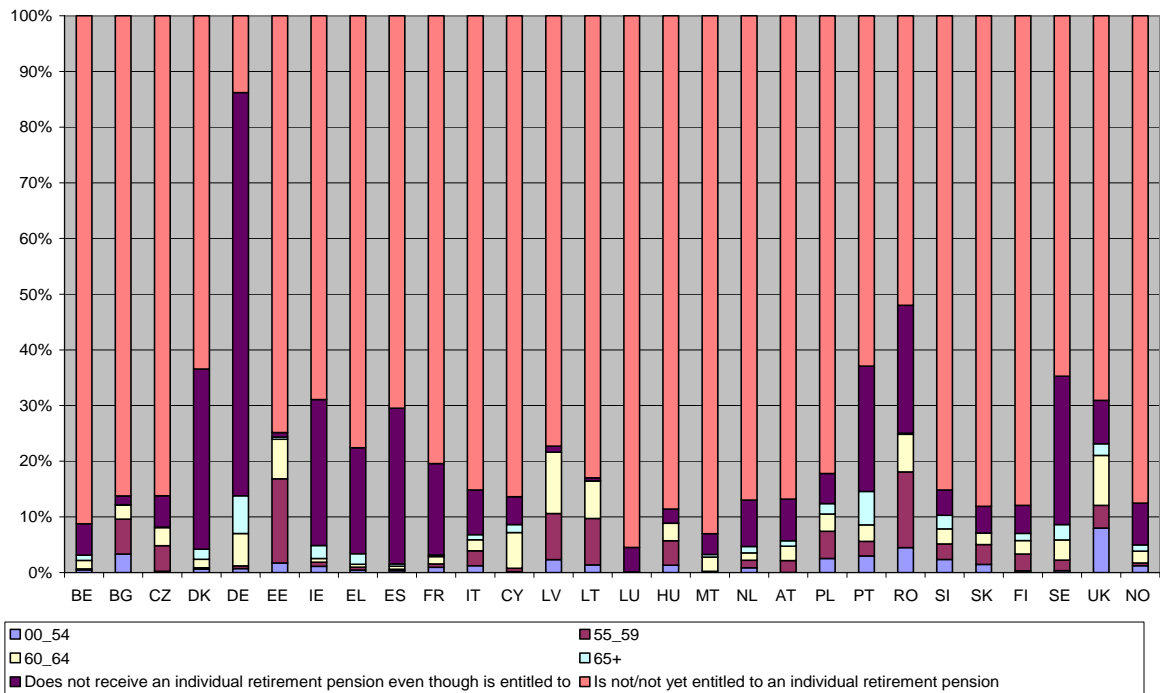
AGEPENS (Col.248/249) "Age at which person started to receive an individual retirement pension"

The majority of countries (BE, BG, CY, CZ, DK, ES, FR, LT, LV, PL, SK and UK) addressed the question focusing the attention on the individual retirement pensions. But among these countries, however, some specifications have to be made: BG and SK included social pensions; CZ excluded non regular retirement pensions; DK and UK included voluntary pensions. Some other countries (AT, EE and IT) extended the possibilities of answer to respondents presenting them a number of items to take also into account non individual and other pensions (i.e. widow/survivor, social, disability, voluntary, etc.) in order to identify individual retirement pensions. These different approaches show that there is maybe not a clear definition of the term "retirement pension".

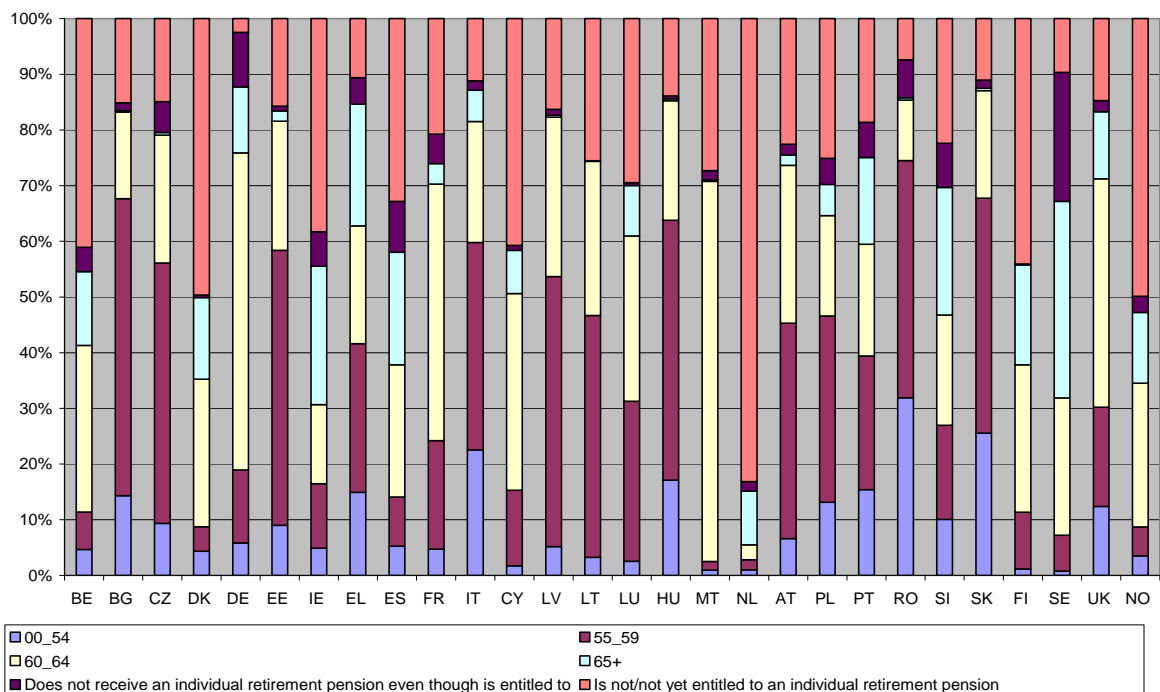
For the repetition of the module the focus should be on "retirement" pensions due to a previous working activity. The explanatory notes should provide more details about the issue which types of retirement pension are relevant. Moreover instead of asking the "Age at which person started to receive an individual retirement pension" it could be easier to ask "Year and month at which...".

The figures and tables below show the main distribution within the countries and the reasons for atypical patterns.

Distribution AGEPENS for employed persons (WSTATOR=1,2)

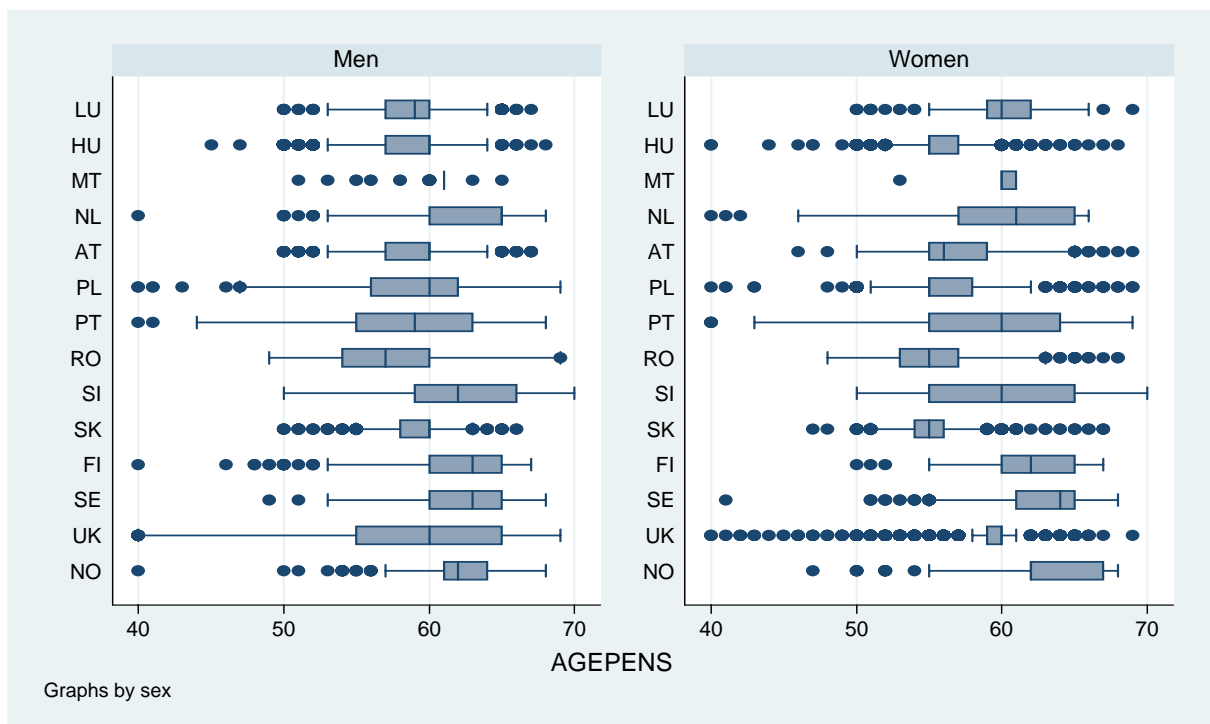
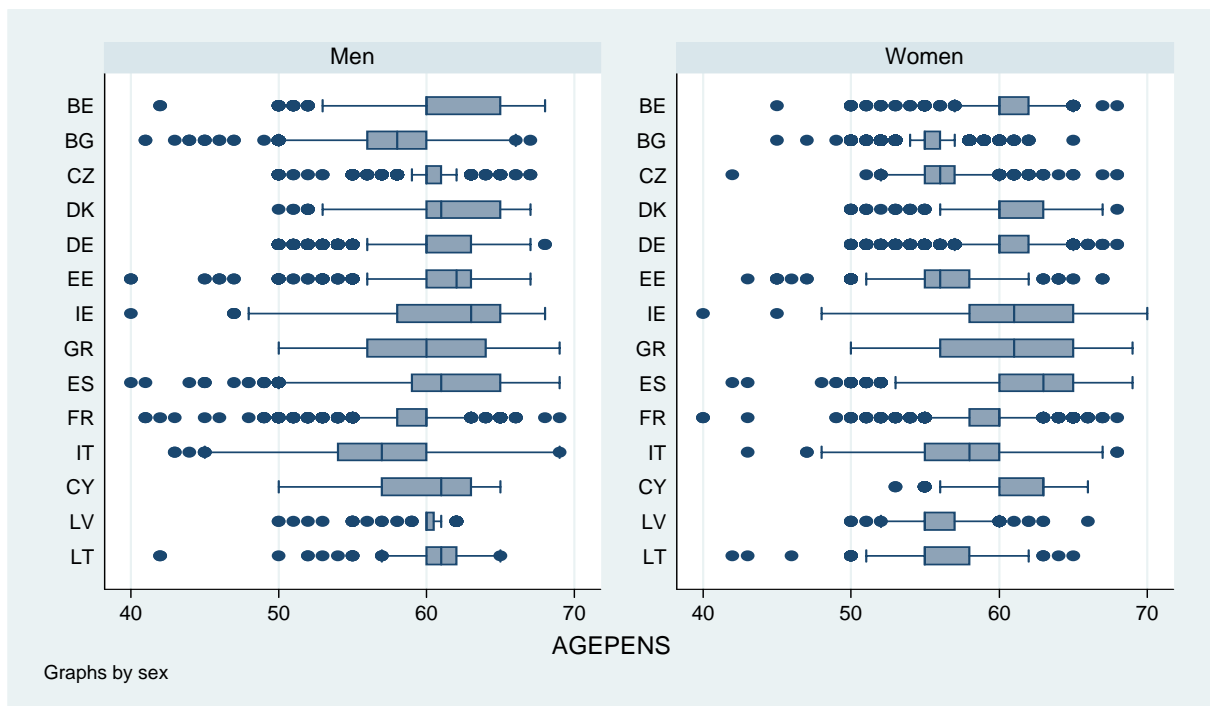


Distribution AGEPENS for not employed persons (WSTATOR=3,5)



Country	Item	Employment status	Problem	Reason
DE	97	1,2	Comparatively high frequencies	About 90% of employed persons who answered code 97 are younger than 60. These people usually are not retired.
DK	97	1,2	Comparatively high frequencies	Individual retirement pensions are not very widespread in Denmark.
SE	97	1,2 and 3,5	Comparatively high frequencies	No explanation.

For those persons who answered with a detailed age category the graphs below showing the distribution by sex.

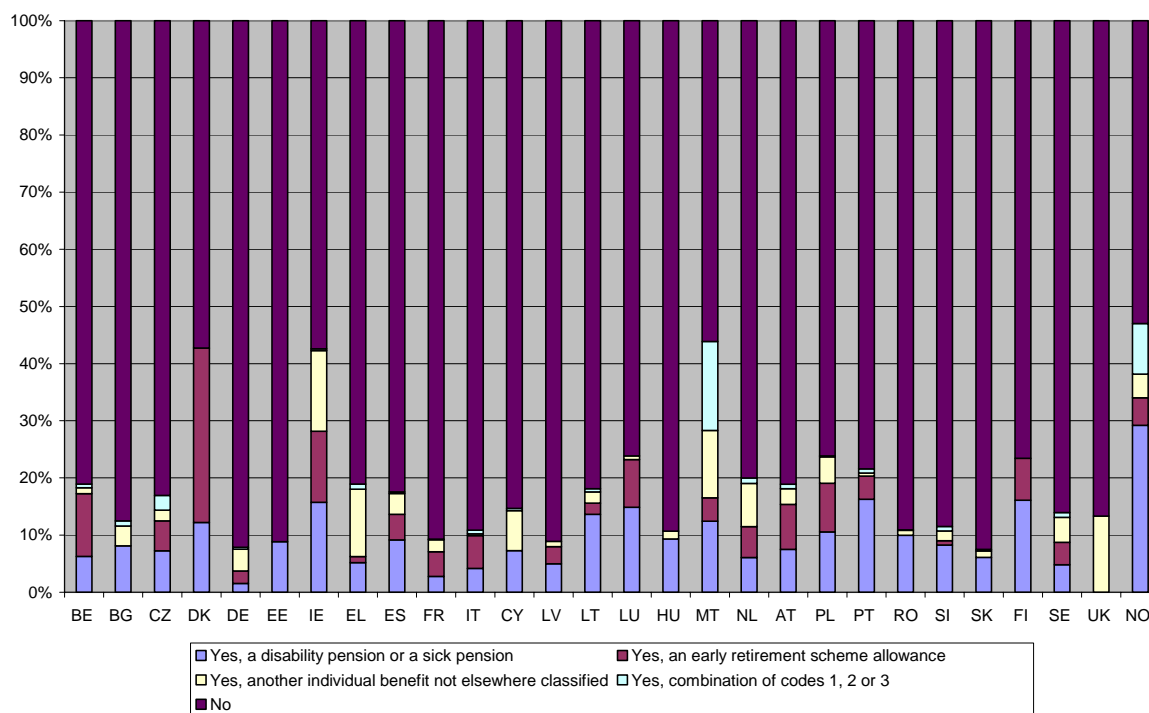


Note: Figures above show horizontal box plots. The graphs show the median, the upper 25 percentile, lower 25 percentile, upper and lower adjacent values as well as outside values. Distribution is calculated for all persons which stated a age where they started to receive a individual retirement (AGEPENS<97).

OTHBENF (Col.250) "Person receives an individual pension or individual benefits ..."

With respect to the implementation of this variable most of the countries reported problems with the definitions provided in the explanatory notes for individual pension or individual benefits. The cross country comparability could be influenced by misunderstandings of the explanatory notes. The figure and table below show the main distribution within the countries and the reasons for atypical patterns.

Distribution OTHBENF for not employed persons (WSTATOR=3,5)



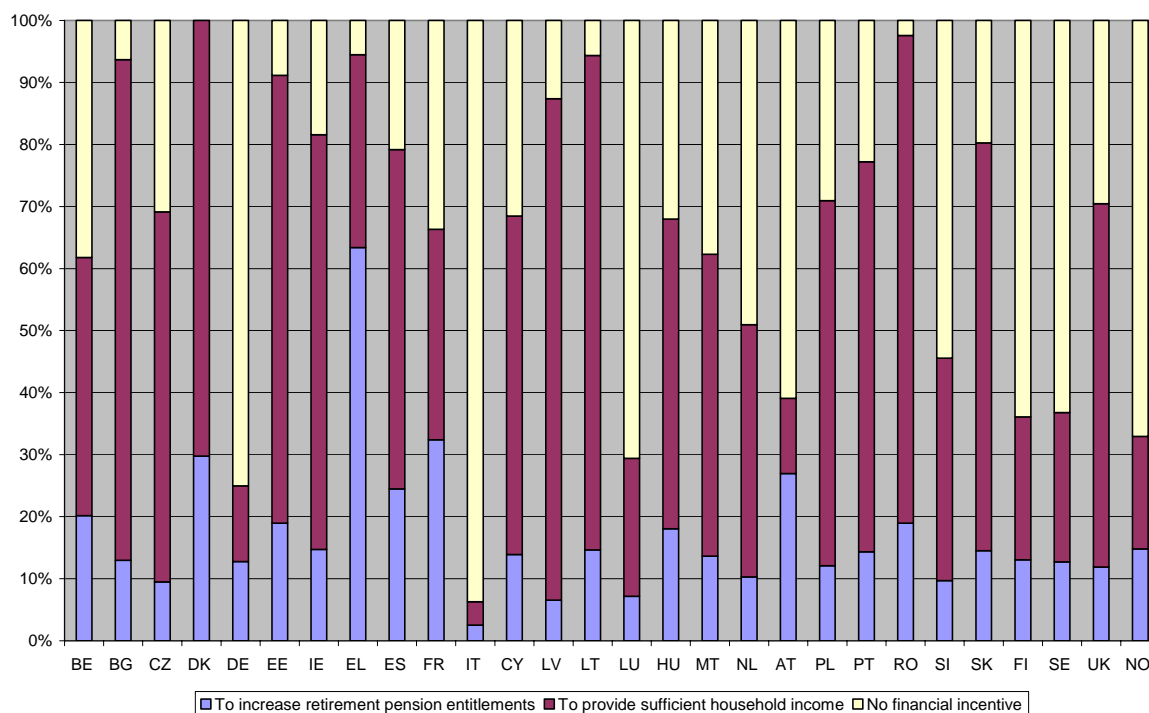
Country	Item	Employment status	Problem	Reason
BG	2	all	No values for this item	No early retirement scheme allowance is paid.
CY	2	all	No values for this item	No such allowance exists.
EE	2	all	No values for these item	Code 2 is missing in the database because "Early retirement scheme allowance" does not exist in Estonia.
HU	2	all	No values for this item	Not typical in Hungary, this category was omitted.
RO	2	all	No values for this item	Early retirement scheme allowance does not exist in Romania.
SK	2	all	No values for this item	An early retirement scheme allowance described in the explanatory notes does not exist in Slovakia.
DK	3	all	No values for this item	Code 3 was not included as an option in the Danish questionnaire, as the list of codes was considered conclusive.
EE	3	all	No values for these item	Code 3 is missing in the database because even in principle "National pension" can be classified here (answer 8 to question M03 in Estonian LFS ad hoc module questionnaire), there was no responses to this category. It was expected as actual number of persons aged 50-69 entitled to national pension is insignificant.
UK	1 and 2	all	No values for these item	These values cannot be coded for the UK.

FININCTV (Col.251) "Main financial incentive to stay at work"

Whereas some countries only used one question to construct the variable, others divided it into two questions. First, whether financial incentives influence the decision to stay longer at work. Second, in case answer to the latter question was yes, the type of financial incentive involved (current revenue versus future pension). Some countries found the filter of this question too restrictive which led to missing values. Due to the reason that some countries (FR and FI) didn't used the filter in the correct way they faced some problems. In particular, older persons receiving a retirement pension while working were often not asked about their main financial incentive to stay at work. For the repetition of the module, a wider filter would be better.

The figure and table below show the main distribution within the countries and the reasons for atypical patterns.

Distribution FININCTV for not employed persons (WSTATOR=3,5)



Country	Item	Employment status	Problem	Reason
EL	1	all	Comparatively high frequencies	In Greece, pension entitlements depend on the level of salary during the last 5 years before retirement. So there is a strong motive for people to stay more years in the job (though they have the right to retire) in order to have higher pension (since the salary of a person who works, for example, 30 years, is usually much higher than the salary of a person working 25 years).
DE	3	all	Comparatively high frequencies	Maybe pensions nowadays are still high enough and free-time is more important than financial incentives.
DK	3	all	No values for this item	DK have no suggestion to solve this problem. They realise that the data collection has been flawed in this regard.
IT	3	all	Comparatively high frequencies	Financial incentives represent a very limited tool in Italy. The employees of the private sector only can take advantage from this cash benefit.
LU	3	all	Comparatively high frequencies	Good social security system, therefore if people stay longer at work there is mostly no financial incentive.

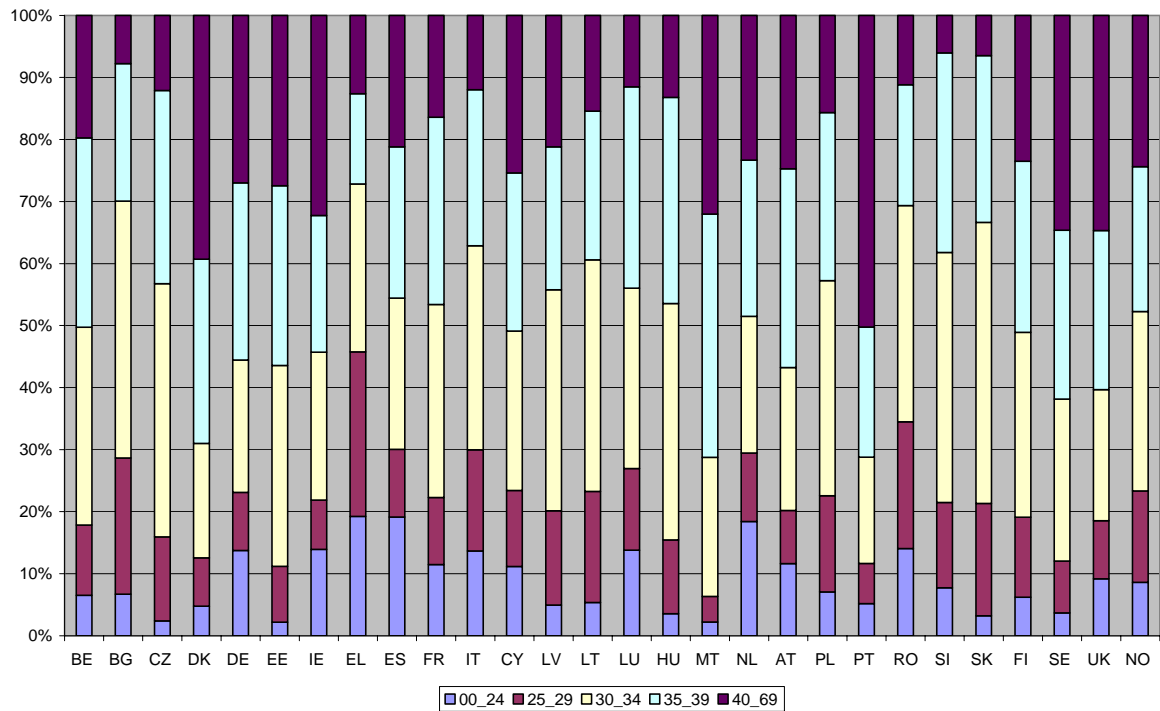
The Task Force pointed out that the responses are maybe influenced by the age of the respondent. The more detailed analysis provided hints that the incentive for older persons (65+) to stay at work is providing sufficient household income.

YEARSPT (Col.252/253) "Number of years spent working for pay or profit"

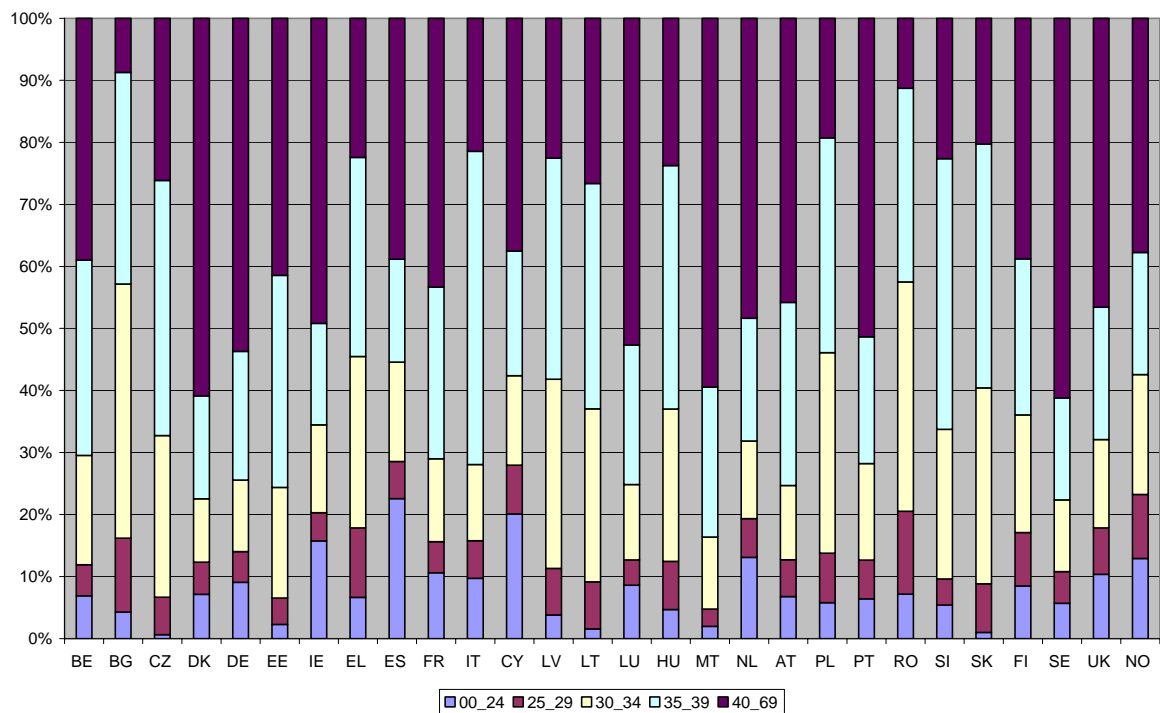
Due to different treatment of breaks from works (e.g. unemployment, sickness, maternity leave, parental leave ...) this variable could be problematic with respect to cross country comparability. Some countries pointed out that respondents were not able to calculate the correct number of years (especially older persons). In addition some persons did not know what to state in case of breaks in their working life (e.g. parental leave). The explanatory notes should provide more precise guidelines.

The figures and table below shows the main distribution within the countries and the reasons for atypical patterns.

Distribution YEARSPTNT for employed persons (WSTATOR=1,2)



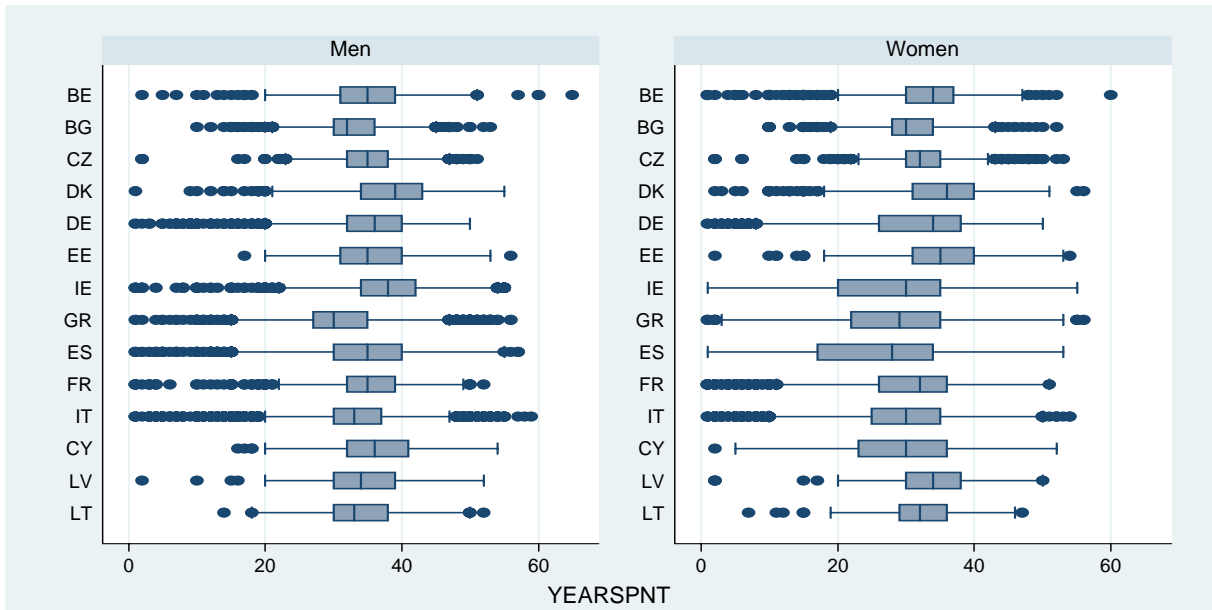
Distribution YEARSPTNT for not employed persons (WSTATOR=3,5)



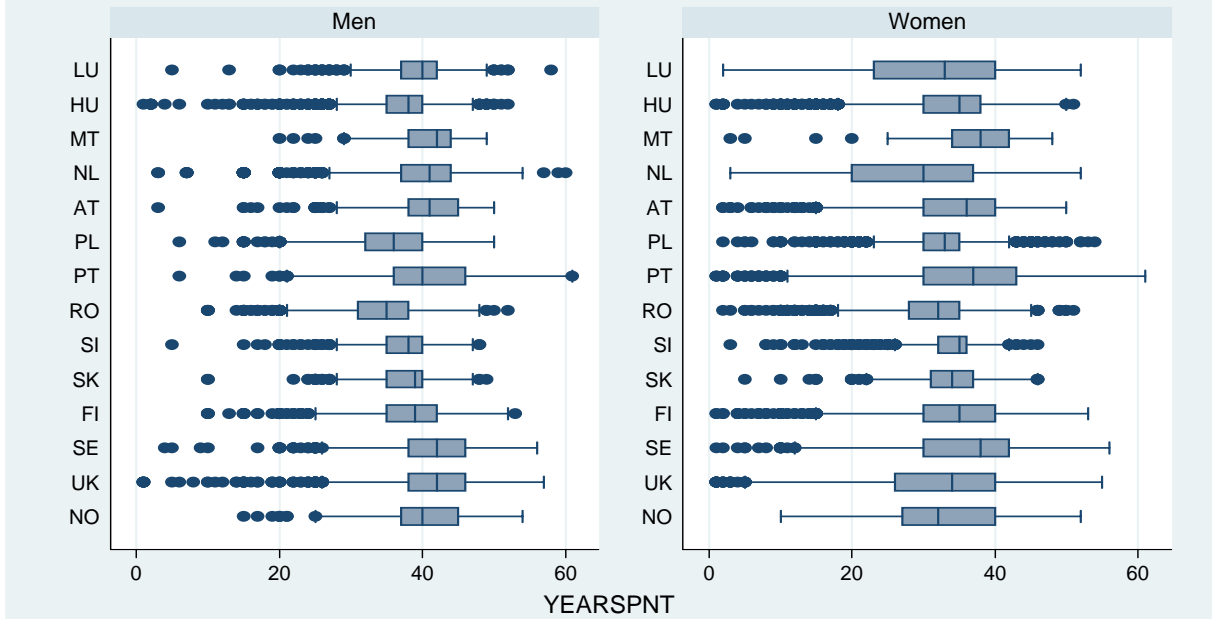
Country	Item	Employment status	Problem	Reason
CY	00-24 years	3.5	Comparatively high frequencies	The frequencies show that the respondents in this group are only women. This can be explained by the low participation of women in the labour market in Cyprus especially before 1980 and in addition to the exit of a percentage of women from the labour market for bringing up their children.
ES	00-24 years	3.5	Comparatively high frequencies	It is due to the late inclusion of women in the labour market. The participation of women in the Spanish labour market has been more active since the sixties.

In addition, the distribution of this variable provides a more detailed intuition.

For persons with WSTATOR=1,2:

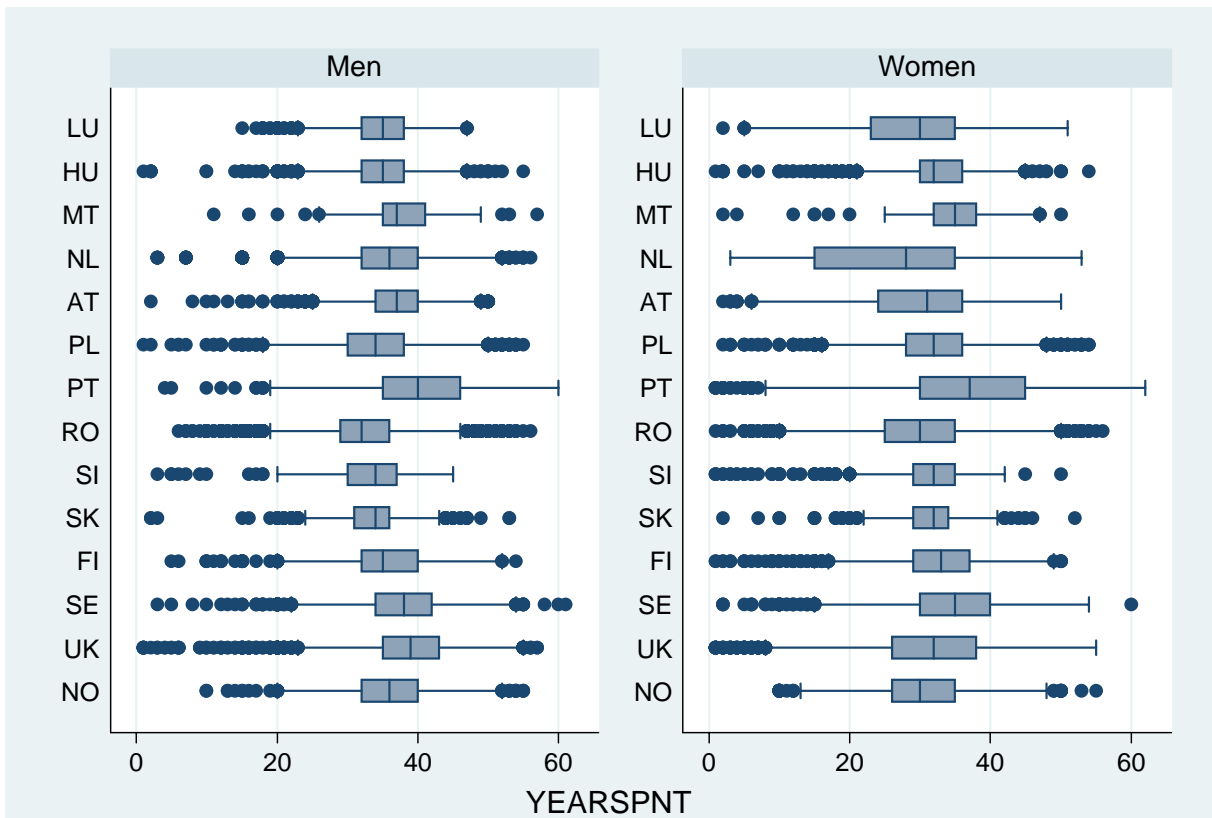


Graphs by sex

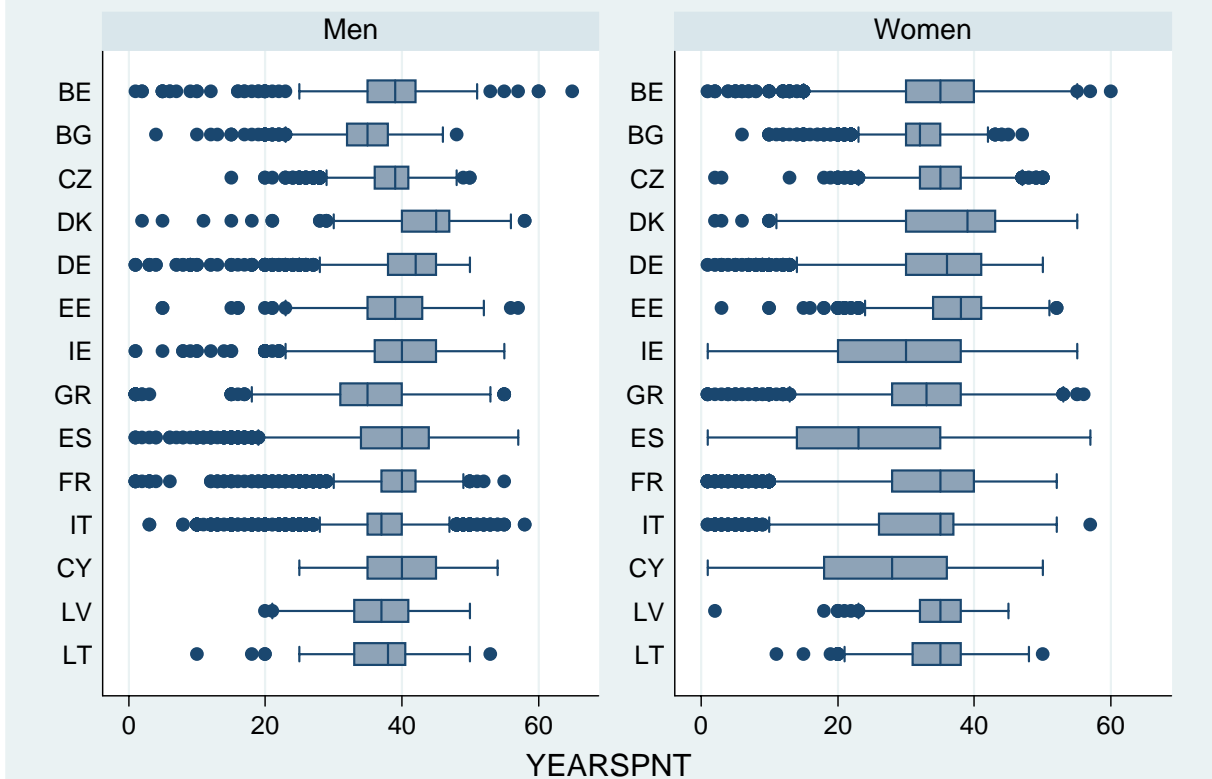


Graphs by sex

For persons with WSTATOR=3,5:



Graphs by sex



Graphs by sex

Note: Figures above show horizontal box plots. The graphs show the median, the upper 25 percentile, lower 25 percentile, upper and lower adjacent values as well as outside values. Distribution is calculated for all persons which stated a number of years spent working (YEARS PNT < 99).

7 Dissemination in Eurostat Database

The main variables which have to be crossed with the variables from the ad hoc module are

- sex (male and female)
- age (50-54, 55-59, 60-64 and 65-69)
- employment status (employed (WSTATOR=1,2) and not employed (WSTATOR=3,5))

REDUCHRS (Person reduced working hours): Combining codes 1 with 2 (yes) as well as 4 (no and no plans) with 5 (no and do not know for the next 5 years) in single codes. For employed persons crossing by FTPT, NACE1D, STAPRO and ISCO1D. For not employed persons crossing by NACEPR1D, STAPROPR and ISCOPR1D.

PLAGESTP: Recode 2-digit codes to the respective 90-codes (94, 95, 96). For employed persons crossing by FTPT, NACE1D, STAPRO and ISCO1D. For not employed persons crossing by NACEPR1D, STAPROPR and ISCOPR1D.

STATAFT: Crossing with AGEPENS (mean and median).

REASRET (reason for retirement): Combining job related reasons (1, job lost; 5 problems related to job and 8 other; legal/preference to stop codes (2, reached compulsory retirement age and 7, preference to stop other than previous) and personal reasons (3, own health; 4, care responsibilities and 6, favourable financial arrangements) in single codes. Crossing with STATAFT, YEARSNT and AGEPENS.

FLEXWORK, OPPSKILL and HLTHSAF: For employed persons crossing by NACE1D, STAPRO, ISCO1D, YEARSNT and AGEPENS. For not employed persons crossing by NACEPR1D, STAPROPR, ISCOPR1D, STATAFT, YEARSNT and AGEPENS.

OTHBENF: Crossing by YEARSNT and AGEPENS.

FININCTV: Crossing by NACE1D, STAPRO, ISCO1D, YEARSNT and AGEPENS.

AGEPENS and YEARSNT: Mean and Median. Crossing by NACE1D and ISCO1D.

Annex 1: National conditions on retirement in 2006

Country	Standard pension	Early pension	Deferred pension
BE	Men: 65 years Women: 64 years	Age 60 (women and men) after 35 years of professional activity.	No deferred pension.
BG	First Pillar: Men: 63 years of age and 100 points. Women: 59 years of age and 93 points. Number of points = age + years of insurance. Specific provisions exist for certain professions. Second Pillar: Entitlement arises when the insured person acquires right to a standard old-age pension under the First Pillar. For details see MISSOC.	There exist two separate schemes for early retirement. The one is the so called Teachers pension fund, a public statutory PAYG scheme. The second one is a private scheme for supplementary compulsory pension insurance on a capital base under the second pillar for early retirement of persons working under hard labour conditions, a Professional pension fund. Apart from these two separate schemes there is a regime for early retirement in the frame of the general statutory scheme with universal coverage. Possible for persons who have worked 10 years under the first category of labour and have reached 47 years of age for women and 52 years of age for men or 15 years under the second category of labour and 52 years of age for women and 57 years of age for men. This regime is in force until 2009.	Insured persons can work beyond entitlement to a pension and there is no maximum age applied.
CZ	Men: 61 years and 8 months. Women: depends upon the number of children raised: no children 60 years, 1 child 59 years, 2 children 58 years, 3 or 4 children 57 years, 5 or more children 56 years. The retirement age shall be gradually increased by 2 months for men and 4 months for women each year until it reaches 63 years for men and women without children and 59 - 62 years for women with children."	Available up to three years prior to the normal retirement age, the actual date of retirement is left to the claimant's discretion. The claimant must have an insurance record of at least 25 years.	Minimum of 90 days after normal retirement age, no maximum limit.
DK	Social Pension: 65 (67 for those who had reached the age of 60 on 1.7.1999). Supplementary pension: 67. However, persons may demand the pension before the age of 67, but not before the age of 65. The pension is proportionally reduced from the age 67 down to 65 years.	Social Pension: No retirement possible before the statutory pensionable age of 65 years.	Social Pension: Deferment up to 120 months possible at any time after the pensionable age. Supplementary pension: Deferment possible until reaching the age of 75.
DE	65 years (standard retirement age).	Early retirement is possible. For details see MISSOC.	Unlimited deferment possible.
EE	Men: 63 years Women: 60 years	Early Retirement Pension: Available up to 3 years before the legal retirement age. For details see MISSOC.	Unlimited deferment possible.

IE	State Pension (Transition): 65 years. State Pension (Contributory): 66 years.	No early pension.	No deferred pension.
GR	Persons insured before 1.1.1993: Men: 65 years Women: 60 years Persons insured since 1.1.1993: Men: 65 years Women: 65 years	Persons insured before 1.1.1993: Full pension: Without age condition if 37 insurance years or 11,100 days, For details see MISSOC Reduced pension: For details see MISSOC Persons insured since 1.1.1993: Full pension: Without age condition if 37 insurance years or 11,100 days, Reduced pension: For details see MISSOC	Deferment possible until the age of 67 years.
ES	65 years.	60 years of age for certain persons who were insured according to the system abolished on 1 January 1967. 61 years of age for employees in certain cases. The age of 65 can be reduced for certain groups whose professional activity is arduous, toxic, dangerous or unhealthy."	As a general rule, unlimited deferment possible.
FR	General scheme for employees: 60 years. Complementary schemes for employees: 65 years of age, with possibility to obtain the pension at the age of 60 if the basic pension was accorded at a full rate.	General scheme for employees: Since the age of 56 for the insured that started their professional activity at the age of 14 and under a triple condition (duration of insurance, duration of contribution and retirement age). Since the age of 55 for the insured with severe disability who fulfils the minimum periods of insurance and contribution. Complementary schemes for employees: Since the age of 55 with an anticipation coefficient or without coefficient if the insured obtained the basic pension at a full rate.	General scheme for employees: After 60 years, increase of the pension amount (over-evaluation) if the insured fulfils the insurance condition for a full rate pension. After 65 years, increase of the insurance duration if the insured does not fulfil (for any basic scheme) the requested duration of insurance depending on the year of birth. Complementary schemes for employees: No specific measure because the number of pension points is related to the duration of contributions."

IT	Persons insured before 1.1.1996: Men: 65 years. Women: 60 years. Persons with a disability of at least 80% and blind people: 60 years for men, 55 years for women. Persons insured since 1.1.1996: Flexible retirement age between 57 and 65 years.	Early retirement pension: at the age of 57 with 35 years of contributions or after 37 years of contributions regardless of age. Pensions awarded to employees of companies in economic difficulties: Early retirement is possible up to 5 years before normal retiring age. Special conditions for employees with an early start of working life (minimum 52 contribution weeks in the age of 14 - 19 years), for employees exposed to arduous work, for persons benefiting from specific measures to return to the labour market because of a shut-down or a reorganisation of the enterprise and for manual workers."	Deferment possible up to the age of 65 years. From October 2004 until December 2007, employees from private sector who have reached the age of pension can decide to stay at work: their pension will be "frozen". They will receive their salary and a bonus corresponding to the contributions paid by employees and employers, of 33% (not subject to taxation).
CY	65 years for men and women; 63 years for miners.	63 years for men and women provided that the insured person: For details see MISSOC	Deferment possible until the age of 68 years.
LV	Men: 62 years. Women: 61,5 years by 1 July 2007 (gradually increasing by 6 months every year until it reaches 62 years)."	Until 1st July, 2008, men and women with an insurance period of not less than 30 years may claim for a pre-retirement pension two years before the standard retirement age.	Unlimited deferment possible.
LT	Men: 62.5 years Women: 60 years	Persons are eligible for early retirement pension if: they have an insurance period of 30 years; they are registered as unemployed for at least 12 months; the age is less than 5 years to retirement age."	Deferment possible up to five years.
LU	65 years.	Early retirement pension: From 60 years of age, on condition that 480 months of effective insurance can be proved or assimilated periods can be proved. From 57 years of age, on condition that 480 months of effective insurance can be proved."	No deferred pension. If the person is active beyond 65 years of age, the contributions paid by the insured are refunded at the end of the year.
HU	1st and 2nd pillar: 62 years of age.	Available For details see MISSOC.	Unlimited deferment possible except in certain professions, civil servant, judges.
MT	For persons born before 1st January 1952: Men: 61 years. Women: 60 years. Women given the option to retire at 61 years if so they wish. For persons born during the calendar years 1952 to 1955: Men & women 62 years. For persons born during the calendar years 1956 to 1958: Men & women: 63 years. For persons born during the calendar years 1959 to 1961: Men & women: 64 years. For persons born on or after 1st	For persons born before 1st January 1952: No early pension. For persons born between 1952 and 1961: Can retire at age 61 if they have 35 years of paid/credited weekly social security contributions (35 x 52 = 1820 contributions). For persons born on or after 1st January 1962: Can retire at age 61 if they have 40 years of paid/credited weekly social security contributions (40 x 52 = 2080 contributions). In all cases, those opting for early	Deferment possible for persons not opting for the early pension. Contributory pension is deferred if the pensioner opts to continue working after reaching the statutory retirement age and his income exceeds the National Minimum Wage. A pension will be awarded at age 65 irrespective of the earnings of the beneficiary.

	January 1962: Men & women: 65 years"	pension cannot be employed until age 65."	
NL	65 years.	No early retirement.	No deferred pension.
AT	Men: 65 years and Women: 60 years.	General legislation: 62 years for men and women. At the earliest 60 years for heavy workers provided that they have worked heavily at least 10 years during the preceding 20 years, and have a total of 45 insurance years. Transitional legislation: For persons having completed the age of 50 on 1 January 2005, and for younger persons who have already acquired one insurance month at this point in time, in addition: 747 months of life for men. 687 months of life for women. For details see MISSOC.	Unlimited deferment possible.
PL	Women: 60 years and Men: 65 years	Early Pension: Persons born before 1.1.1949. For details see MISSOC. Persons born since 1.1.1949: No provisions."	Increased period of employment reflected in pension formula (no maximum period, all periods are taken into account).
PT	65 years.	Insured persons aged at least 55 provided that they have completed their qualifying period and a contribution period of 30 calendar years. The amount of pension is reduced. Unemployed: from the age of 62 provided that they were aged 57 at the beginning of their unemployment and have completed the qualifying period. For those who have contributed 22 calendar years and are aged 52 or more when unemployed, it is also possible from the age of 57. In this case the pension amount is reduced. In case of heavy or unhealthy work: as a rule, from the age of 55 (only for professions legally foreseen). From 55 years in case of specific measures to protect economic activities or companies."	Unlimited deferment possible.

RO	Old-Age Pension: The difference between the standard retirement ages for man and woman is maintained: Man: 63 years and 1 month on 1 July 2007, increasing to 65 in 2014. Woman: 58 years and 1 month on 1 July 2007, increasing to 60 in 2014."	Old-Age Pension with Reduced Standard Retirement Age (pensia pentru limita de varsta cu reducerea varstelor standard de pensionare): For details see MISSOC. Early Retirement Pension: Granted maximum 5 years before the standard retirement age to an insured person who exceeds the full contribution period by minimum 10 years. Partial Early Retirement Pension: Granted maximum 5 years before the standard retirement age to an insured person who exceeds the full contribution period by maximum 10 years."	Granted for an unlimited period to an insured person who is eligible for Old-Age Pension (pensia pentru limita de varsta) and who continues contributing to the public system of pensions' scheme.
SI	Legal full retirement age is 61 years for women and 63 for men.	No special early pension. Possibility of exceptions (no malus) in the case of retirement at the age of 58 provided that a person has completed 40 years (men) or 38 (women) years of service.	Unlimited deferment possible.
SK	Old-Age Pension: 62 years.	1st Pillar: Early pension is possible if the minimum duration of membership (10 years) and the minimum amount of benefit (1.2-times of the subsistence minimum) have been reached. No age limit. 2nd Pillar: Early pension is possible if the early pension of the 1st pillar is received and the minimum amount of benefit (0.6-times of the subsistence minimum) has been reached. No age limit.	Unlimited deferment possible.
FI	National pension: 65 years. Statutory earnings-related pension: Old-age pension to one's own choice between the ages of 63 to 68. In the public sector there are lower individual retirement ages.	National pension (Kansaneläke) and Statutory earnings-related pension: Early old-age pension from the age of 62. In the Statutory earnings-related pension scheme, the early old-age pension will be permanently reduced by 0.6% for each month that the pension is taken early. The National pension is similarly permanently reduced by 0.4%."	As a general rule, unlimited deferment possible.
SE	Flexible retirement age from 61 to 67 years. Possibility to work thereafter with employers consent.	No early pension.	Unlimited deferment possible. Pension rights can be accrued as long as a person has pensionable earnings.
UK	State Pension age: Men: 65 years. Women: 60 years	No early State Pension.	Unlimited deferment possible.
NO	67 years.	No early retirement.	Deferment possible up to three years.

Source: Mutual Information System on Social Protection (MISSOC)
http://ec.europa.eu/employment_social/spsi/missoc_en.htm

Annex 2

Data frequencies (weighted results) – Module 2006

REDUCHRS (Col.240): Employed persons (WSTATOR=1,2)

	1	2	3	4	5
BE	6.29%	9.52%	21.43%	52.96%	9.80%
BG					
CZ	0.00%	4.08%	1.25%	70.83%	23.84%
DK	0.71%	3.77%	12.48%	12.23%	70.81%
DE	12.06%	4.71%	7.85%	32.58%	42.80%
EE	0.00%	7.80%	2.93%	29.76%	59.51%
IE	0.00%	11.78%	7.44%	71.31%	9.47%
EL	0.00%	3.28%	4.22%	77.12%	15.38%
ES	0.61%	2.97%	6.98%	71.93%	17.50%
FR	1.86%	2.41%	15.57%	76.61%	3.55%
IT	0.20%	2.47%	3.57%	79.21%	14.55%
CY	0.00%	1.64%	1.06%	68.34%	28.96%
LV	0.44%	1.78%	3.69%	37.76%	56.33%
LT	0.99%	0.09%	3.56%	18.41%	76.94%
LU	1.83%	4.16%	3.69%	71.97%	18.34%
HU	0.00%	8.78%	9.62%	22.39%	59.21%
MT	5.35%	11.55%	0.00%	0.00%	83.10%
NL	6.87%	7.11%	10.72%	63.48%	11.82%
AT	2.20%	3.98%	5.92%	56.54%	31.37%
PL	0.00%	4.22%	6.08%	12.56%	77.14%
PT	0.00%	13.06%	11.02%	23.02%	52.90%
RO	0.88%	2.15%	1.77%	59.42%	35.78%
SI	5.08%	13.29%	4.04%	75.16%	2.43%
SK	0.00%	1.59%	2.73%	58.32%	37.36%
FI	3.01%	8.90%	19.90%	65.73%	2.46%
SE	0.62%	3.76%	16.99%	65.69%	12.94%
UK	0.46%	10.89%	17.53%	55.34%	15.77%
NO	3.90%	24.62%	9.31%	53.57%	8.61%

REDUCHRS (Col.240): Not employed persons (WSTATOR=3,5)

	1	2	3	4	5
BE	2.20%	1.58%	0.79%	89.78%	5.66%
BG					
CZ	0.00%	4.13%	0.00%	95.87%	0.00%
DK	3.74%	8.55%	1.01%	79.33%	7.37%
DE	47.29%	20.87%	2.25%	17.07%	12.52%
EE	0.00%	4.41%	0.67%	81.39%	13.54%
IE	0.00%	18.62%	1.13%	72.05%	8.19%
EL	0.00%	3.25%	1.37%	93.89%	1.49%
ES	0.68%	2.49%	3.30%	87.66%	5.87%
FR	4.45%	1.80%	0.00%	0.00%	93.75%
IT	0.08%	2.05%	2.09%	94.83%	0.95%
CY	0.00%	2.24%	0.90%	91.30%	5.56%
LV	0.00%	0.69%	0.00%	2.30%	97.00%
LT	0.94%	0.20%	0.56%	42.66%	55.64%
LU	0.32%	0.60%	0.38%	97.91%	0.79%
HU	0.00%	1.56%	2.28%	92.24%	3.91%
MT	2.59%	6.12%	0.00%	0.00%	91.29%
NL	4.51%	7.10%	0.00%	0.00%	88.39%
AT	3.32%	3.62%	0.42%	89.21%	3.44%
PL	0.00%	11.42%	0.00%	58.81%	29.77%
PT	0.00%	25.46%	1.74%	42.55%	30.26%
RO	0.56%	1.34%	0.21%	93.69%	4.21%
SI	17.06%	82.94%	0.00%	0.00%	0.00%
SK	0.00%	0.21%	0.22%	90.02%	9.55%
FI	7.91%	4.00%	0.27%	72.28%	15.54%
SE	12.39%	39.95%	13.09%	31.84%	2.73%
UK	0.60%	13.38%	8.11%	73.53%	4.38%
NO	16.50%	83.50%	0.00%	0.00%	0.00%

PLAGESTP (Col.241/242): Employed persons (WSTATOR=1,2)

	50-59	60-64	65+	94	95	96	97	98
BE	12.11%	24.10%	20.72%	6.69%	12.00%	9.85%	14.04%	0.48%
BG	4.49%	20.60%	6.32%	5.26%	10.59%	30.75%	21.99%	0.00%
CZ	15.34%	48.24%	14.17%	2.65%	7.28%	6.83%	5.49%	0.00%
DK	0.67%	51.86%	26.39%	1.14%	6.34%	10.81%	2.80%	0.00%
DE	1.67%	29.22%	46.70%	0.92%	7.18%	4.28%	10.03%	0.00%
EE	0.42%	4.46%	1.65%	1.32%	9.00%	51.94%	31.20%	0.00%
IE	2.50%	9.12%	23.40%	2.88%	9.40%	29.55%	23.14%	0.00%
EL	1.31%	2.27%	9.40%	6.86%	31.07%	29.62%	19.46%	0.02%
ES	2.54%	16.57%	25.65%	2.16%	4.91%	16.79%	31.12%	0.25%
FR	21.63%	49.45%	12.49%	2.11%	3.12%	9.11%	2.10%	0.00%
IT	12.82%	18.41%	11.99%	1.92%	2.77%	46.38%	5.65%	0.06%
CY	2.02%	28.14%	10.87%	0.78%	5.61%	40.29%	12.29%	0.00%
LV	0.53%	21.47%	8.93%	2.25%	12.93%	8.16%	43.80%	1.93%
LT	0.88%	13.27%	1.22%	1.94%	21.08%	8.62%	52.99%	0.00%
LU	16.10%	19.81%	8.04%	6.83%	22.19%	11.24%	15.63%	0.17%
HU	6.40%	23.39%	2.03%	9.40%	24.26%	21.51%	13.01%	0.00%
MT	2.07%	41.57%	1.50%	2.73%	36.86%	2.50%	12.13%	0.64%
NL	4.67%	38.44%	29.77%	1.86%	8.72%	10.90%	5.27%	0.35%
AT	17.01%	46.46%	15.24%	4.07%	6.63%	3.63%	6.93%	0.04%
PL	5.35%	9.42%	6.90%	8.45%	12.22%	12.73%	44.91%	0.00%
PT	1.35%	2.51%	11.75%	1.91%	9.22%	33.52%	39.73%	0.00%
RO	2.32%	2.83%	1.13%	11.11%	13.49%	59.14%	9.98%	0.00%
SI	27.58%	24.87%	7.81%	9.25%	8.00%	12.42%	10.07%	0.00%
SK	3.54%	13.74%	1.24%	9.94%	17.03%	35.41%	19.10%	0.00%
FI	3.44%	40.42%	17.46%	3.27%	15.65%	6.96%	12.80%	0.00%
SE	0.93%	13.29%	29.43%	0.95%	18.49%	23.29%	13.61%	0.00%
UK	3.90%	24.50%	28.68%	1.39%	8.65%	25.10%	7.78%	0.00%
NO	0.76%	16.87%	10.16%	0.88%	27.23%	18.20%	25.91%	0.00%

PLAGESTP (Col.241/242): Not employed persons (WSTATOR=3,5)

	50-59	60-64	65+	94	95	96	97	98
BE	4.75%	6.10%	6.85%	0.48%	1.85%	0.62%	2.24%	77.10%
BG	0.39%	2.70%	1.07%	0.58%	1.57%	4.11%	4.24%	85.33%
CZ	1.93%	3.41%	0.81%	0.46%	0.29%	0.26%	0.46%	92.39%
DK	0.13%	4.74%	2.12%	0.00%	0.40%	2.34%	0.67%	89.59%
DE	0.21%	4.31%	5.15%	0.26%	1.36%	0.58%	1.29%	86.85%
EE	1.14%	0.51%	0.50%	1.12%	1.72%	3.72%	8.09%	83.20%
IE	0.91%	0.90%	2.75%	0.55%	0.67%	2.59%	3.97%	87.67%
EL	0.00%	0.25%	0.32%	0.16%	0.88%	1.30%	1.07%	96.03%
ES	0.40%	1.96%	5.89%	0.26%	0.66%	2.49%	7.90%	80.44%
FR	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%
IT	0.16%	0.45%	0.71%	0.12%	0.16%	3.49%	0.47%	94.45%
CY	0.00%	1.42%	0.91%	0.39%	0.88%	2.90%	3.40%	90.11%
LV	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%
LT	0.25%	0.47%	0.34%	0.12%	1.15%	0.17%	1.03%	96.47%
LU	0.27%	1.24%	0.41%	0.63%	1.30%	1.51%	1.77%	92.87%
HU	1.42%	1.93%	0.56%	0.00%	0.00%	0.00%	0.00%	96.09%
MT	0.36%	2.36%	3.49%	0.01%	0.42%	1.66%	0.51%	91.19%
NL	0.87%	2.32%	1.22%	0.32%	0.83%	0.30%	0.80%	93.34%
AT	0.18%	0.73%	0.76%	0.90%	1.44%	0.92%	5.94%	89.10%
PL	0.60%	0.76%	1.72%	0.68%	1.85%	3.41%	6.62%	84.35%
PT	0.14%	0.14%	0.06%	0.74%	0.63%	3.59%	2.27%	92.43%
RO	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	8.00%	92.00%
SI	0.65%	1.04%	0.03%	1.63%	1.44%	1.46%	3.78%	89.97%
SK	0.84%	4.57%	4.28%	0.91%	2.55%	1.89%	5.43%	79.52%
FI	0.08%	1.40%	4.49%	0.02%	0.65%	2.21%	5.28%	85.87%
SE	1.01%	3.41%	3.78%	0.64%	1.38%	5.25%	3.67%	80.85%
UK	0.00%	1.94%	3.60%	0.00%	0.00%	0.00%	0.00%	94.46%
NO	0.00	1.94	3.60	0.00	0.00	0.00	0.00	94.46

STATAFT (Col.243):

	Unemployed	In retirement or early retirement	Long term sick or disabled	Other
BE	16.39%	40.28%	8.78%	34.55%
BG	10.03%	83.38%	5.83%	0.77%
CZ	6.96%	78.31%	12.86%	1.86%
DK	16.07%	62.74%	13.34%	7.84%
DE	21.15%	62.20%	10.02%	6.63%
EE	13.03%	63.91%	20.43%	2.63%
IE	8.83%	66.89%	17.27%	7.01%
EL	4.54%	77.79%	7.45%	10.22%
ES	21.13%	33.02%	20.34%	25.52%
FR	20.77%	58.53%	10.50%	10.19%
IT	8.24%	67.85%	4.61%	19.30%
CY	12.93%	46.43%	15.57%	25.07%
LV	16.26%	70.29%	8.77%	4.68%
LT	16.06%	66.22%	14.92%	2.80%
LU	2.83%	71.40%	18.58%	7.18%
HU	7.61%	68.45%	20.10%	3.83%
MT	3.91%	80.32%	9.61%	6.16%
NL	11.17%	57.73%	18.93%	12.17%
AT	8.86%	71.63%	17.33%	2.17%
PL	10.30%	53.73%	18.79%	17.19%
PT	22.40%	49.91%	21.99%	5.70%
RO	3.85%	83.97%	10.10%	2.07%
SI	13.60%	64.51%	5.32%	16.57%
SK	10.10%	78.07%	8.59%	3.24%
FI	33.31%	39.56%	24.60%	2.53%
SE	14.87%	66.43%	10.62%	8.08%
UK	11.53%	61.64%	17.24%	9.58%
NO	9.16%	31.28%	51.51%	8.05%

REASRET (Col.244):

	1	2	3	4	5	6	7	8
BE	3.98%	44.18%	7.70%	0.30%	2.47%	10.40%	11.21%	19.76%
BG	5.63%	88.81%	3.40%	0.71%	0.67%	0.03%	0.74%	0.00%
CZ	6.79%	0.48%	4.03%	0.57%	3.20%	2.04%	80.54%	2.35%
DK	7.03%	22.88%	22.83%	3.11%	5.09%	3.35%	29.20%	6.51%
DE	10.16%	43.42%	21.43%	0.78%	0.67%	10.22%	0.00%	13.33%
EE	20.22%	18.53%	12.00%	4.78%	5.62%	1.78%	36.93%	0.14%
IE	7.01%	22.73%	20.54%	3.49%	2.91%	10.06%	25.77%	7.50%
EL	0.23%	60.12%	1.33%	0.37%	0.11%	0.32%	36.73%	0.80%
ES	5.11%	48.32%	16.21%	1.93%	2.51%	6.47%	13.00%	6.45%
FR	2.49%	55.39%	4.48%	0.22%	0.81%	26.58%	5.26%	4.76%
IT	2.57%	46.71%	4.81%	2.42%	2.43%	2.72%	35.28%	3.06%
CY	3.48%	65.87%	5.54%	0.00%	0.67%	7.75%	15.59%	1.10%
LV	9.12%	68.28%	10.51%	1.06%	0.96%	1.73%	4.44%	3.89%
LT	5.25%	84.11%	5.64%	1.14%	0.76%	0.88%	0.00%	2.23%
LU	0.26%	83.30%	8.18%	0.09%	1.24%	2.39%	2.42%	2.12%
HU	3.77%	76.22%	6.05%	0.33%	2.11%	4.79%	5.02%	1.72%
MT	0.00%	73.34%	17.05%	0.93%	2.05%	1.62%	4.54%	0.47%
NL	5.81%	16.15%	4.22%	0.86%	0.69%	32.09%	28.77%	11.40%
AT	8.13%	10.75%	15.46%	1.97%	1.62%	6.04%	51.38%	4.65%
PL	14.48%	48.77%	7.15%	1.19%	2.96%	15.98%	5.56%	3.91%
PT	2.00%	46.10%	19.90%	1.20%	2.22%	10.45%	7.87%	10.25%
RO	5.16%	76.47%	5.96%	0.24%	4.33%	1.67%	5.36%	0.82%
SI	1.19%	4.11%	11.48%	0.43%	1.51%	0.44%	3.01%	77.82%
SK	4.17%	0.00%	3.53%	2.26%	2.10%	12.43%	62.34%	13.17%
FI	8.68%	24.05%	18.83%	1.19%	5.80%	3.31%	23.44%	14.71%
SE	3.68%	39.07%	19.53%	1.02%	2.14%	10.02%	16.66%	7.89%
UK	6.13%	22.40%	15.44%	5.51%	4.44%	13.04%	16.74%	16.30%
NO	1.78%	29.70%	20.12%	0.23%	3.75%	12.48%	19.23%	12.71%

FLEXWORK (Col.245):

	Yes (employed)	No (employed)	Yes (not employed)	No (not employed)
BE	14.60%	85.40%	10.60%	89.40%
BG	41.62%	58.38%	14.71%	85.29%
CZ	12.08%	87.92%	4.27%	95.73%
DK	35.48%	64.52%	25.70%	74.30%
DE	9.39%	90.61%	5.70%	94.30%
EE	12.41%	87.59%	5.97%	94.03%
IE	17.51%	82.49%	5.10%	94.90%
EL	9.92%	90.08%	6.61%	93.39%
ES	19.68%	80.32%	12.62%	87.38%
FR	15.66%	84.34%	7.28%	92.72%
IT	17.23%	82.77%	11.90%	88.10%
CY	24.48%	75.52%	11.17%	88.83%
LV	37.91%	62.09%	20.98%	79.02%
LT	73.27%	26.73%	23.40%	76.60%
LU	3.16%	96.84%	2.87%	97.13%
HU	25.94%	74.06%	9.84%	90.16%
MT	31.60%	68.40%	27.10%	72.90%
NL	29.47%	70.53%	22.42%	77.58%
AT	6.21%	93.79%	4.20%	95.80%
PL	32.36%	67.64%	17.70%	82.30%
PT	17.11%	82.89%	9.73%	90.27%
RO	23.33%	76.67%	8.98%	91.02%
SI	11.23%	88.77%	9.79%	90.21%
SK	8.50%	91.50%	8.29%	91.71%
FI	18.78%	81.22%	7.59%	92.41%
SE	29.95%	70.05%	13.10%	86.90%
UK	24.19%	75.81%	9.17%	90.83%
NO	29.80%	70.20%	14.51%	85.49%

OPSKILL (Col.246):

	Yes (employed)	No (employed)	Yes (not employed)	No (not employed)
BE	6.82%	93.18%	6.34%	93.66%
BG	16.84%	83.16%	3.49%	96.51%
CZ	5.42%	94.58%	1.38%	98.62%
DK	10.80%	89.20%	9.57%	90.43%
DE	4.66%	95.34%	4.17%	95.83%
EE	5.23%	94.77%	3.58%	96.42%
IE	3.10%	96.90%	1.06%	98.94%
EL	7.34%	92.66%	5.78%	94.22%
ES	14.63%	85.37%	9.52%	90.48%
FR	11.48%	88.52%	7.44%	92.56%
IT	9.14%	90.86%	5.47%	94.53%
CY	4.16%	95.84%	1.91%	98.09%
LV	25.50%	74.50%	13.61%	86.39%
LT	49.87%	50.13%	12.12%	87.88%
LU	2.14%	97.86%	0.81%	99.19%
HU	7.78%	92.22%	3.45%	96.55%
MT	29.91%	70.09%	23.14%	76.86%
NL	7.20%	92.80%	7.48%	92.52%
AT	2.24%	97.76%	1.42%	98.58%
PL	13.59%	86.41%	9.47%	90.53%
PT	11.62%	88.38%	7.61%	92.39%
RO	14.14%	85.86%	6.87%	93.13%
SI	5.34%	94.66%	5.12%	94.88%
SK	4.47%	95.53%	4.62%	95.38%
FI	5.08%	94.92%	2.65%	97.35%
SE	23.59%	76.41%	13.36%	86.64%
UK	15.11%	84.89%	5.79%	94.21%
NO	13.47%	86.53%	6.47%	93.53%

HLTHSAF (Col.247):

	Yes (employed)	No (employed)	Yes (not employed)	No (not employed)
BE	85.80%	14.20%	81.47%	18.53%
BG	63.89%	36.11%	89.70%	10.30%
CZ	91.65%	8.35%	95.62%	4.38%
DK	90.15%	9.85%	89.23%	10.77%
DE	92.66%	7.34%	92.59%	7.41%
EE	33.43%	66.57%	50.71%	49.29%
IE	93.79%	6.21%	91.63%	8.37%
EL	87.78%	12.22%	89.82%	10.18%
ES	81.12%	18.88%	87.94%	12.06%
FR	94.51%	5.49%	97.01%	2.99%
IT	86.97%	13.03%	89.72%	10.28%
CY	90.58%	9.42%	96.62%	3.38%
LV	58.34%	41.66%	73.86%	26.14%
LT	28.14%	71.86%	73.76%	26.24%
LU	93.44%	6.56%	84.42%	15.58%
HU	74.87%	25.13%	85.48%	14.52%
MT	68.70%	31.30%	73.72%	26.28%
NL	92.95%	7.05%	92.95%	7.05%
AT	96.20%	3.80%	96.14%	3.86%
PL	83.20%	16.80%	87.21%	12.79%
PT	87.37%	12.63%	91.49%	8.51%
RO	71.00%	29.00%	86.00%	14.00%
SI	89.72%	10.28%	89.49%	10.51%
SK	94.75%	5.25%	94.19%	5.81%
FI	93.65%	6.35%	94.87%	5.13%
SE	85.43%	14.57%	87.19%	12.81%
UK	89.41%	10.59%	94.85%	5.15%
NO	76.27%	23.73%	88.12%	11.88%

AGEPENS (Col.248/249): Employed persons (WSTATOR=1,2)

	00-54	55-59	60-64	65+	97	98
BE	0.49%	0.15%	1.53%	0.96%	5.65%	91.22%
BG	3.32%	6.28%	2.52%	0.05%	1.61%	86.22%
CZ	0.26%	4.57%	3.27%	0.08%	5.63%	86.21%
DK	0.58%	0.30%	1.53%	1.80%	32.36%	63.43%
DE	0.71%	0.49%	5.82%	6.79%	72.38%	13.81%
EE	1.73%	15.12%	7.07%	0.41%	0.81%	74.85%
IE	1.12%	0.76%	0.65%	2.34%	26.22%	68.91%
EL	0.44%	0.52%	0.51%	1.93%	19.00%	77.60%
ES	0.36%	0.25%	0.55%	0.42%	27.96%	70.47%
FR	0.93%	0.62%	1.33%	0.27%	16.41%	80.44%
IT	1.25%	2.69%	1.96%	0.89%	8.06%	85.16%
CY	0.18%	0.59%	6.41%	1.48%	4.97%	86.38%
LV	2.33%	8.30%	10.98%	0.00%	1.11%	77.28%
LT	1.38%	8.34%	6.68%	0.07%	0.57%	82.96%
LU	0.03%	0.08%	0.00%	0.00%	4.41%	95.48%
HU	1.33%	4.38%	3.15%	0.03%	2.54%	88.58%
MT	0.00%	0.25%	2.54%	0.47%	3.73%	93.02%
NL	0.86%	1.37%	1.29%	1.15%	8.34%	86.99%
AT	0.03%	2.12%	2.60%	0.97%	7.46%	86.83%
PL	2.52%	4.90%	3.10%	1.87%	5.39%	82.22%
PT	2.97%	2.65%	2.96%	5.99%	22.50%	62.94%
RO	4.49%	13.60%	6.75%	0.20%	22.97%	52.00%
SI	2.35%	2.78%	2.70%	2.48%	4.55%	85.14%
SK	1.47%	3.57%	2.02%	0.07%	4.78%	88.09%
FI	0.31%	3.03%	2.41%	1.30%	5.02%	87.93%
SE	0.34%	1.90%	3.62%	2.79%	26.64%	64.71%
UK	7.97%	4.09%	9.01%	2.06%	7.82%	69.06%
NO	1.24%	0.49%	2.11%	1.12%	7.53%	87.52%

AGEPENS (Col.248/249): Not employed persons (WSTATOR=3,5)

	00-54	55-59	60-64	65+	97	98
BE	4.66%	6.70%	29.96%	13.25%	4.38%	41.06%
BG	14.31%	53.35%	15.55%	0.26%	1.42%	15.11%
CZ	9.33%	46.80%	22.95%	0.46%	5.53%	14.93%
DK	4.35%	4.38%	26.51%	14.66%	0.47%	49.62%
DE	5.84%	13.10%	56.96%	11.83%	9.80%	2.48%
EE	8.99%	49.39%	23.23%	1.82%	0.88%	15.70%
IE	4.90%	11.56%	14.20%	24.86%	6.20%	38.28%
EL	14.92%	26.72%	21.16%	21.88%	4.70%	10.63%
ES	5.28%	8.81%	23.74%	20.18%	9.16%	32.83%
FR	4.71%	19.49%	46.08%	3.67%	5.32%	20.73%
IT	22.54%	37.27%	21.69%	5.67%	1.64%	11.18%
CY	1.73%	13.55%	35.33%	7.77%	0.89%	40.73%
LV	5.18%	48.49%	28.65%	0.32%	1.05%	16.31%
LT	3.26%	43.42%	27.68%	0.13%	0.00%	25.51%
LU	2.55%	28.75%	29.66%	9.07%	0.53%	29.44%
HU	17.10%	46.69%	21.47%	0.35%	0.53%	13.86%
MT	0.95%	1.54%	68.25%	0.30%	1.65%	27.31%
NL	1.02%	1.80%	2.66%	9.68%	1.69%	83.15%
AT	6.62%	38.68%	28.34%	1.88%	1.92%	22.55%
PL	13.14%	33.44%	18.06%	5.59%	4.69%	25.08%
PT	15.40%	24.02%	20.06%	15.58%	6.30%	18.64%
RO	31.93%	42.58%	10.87%	0.40%	6.81%	7.41%
SI	10.04%	16.89%	19.83%	22.92%	7.92%	22.39%
SK	25.56%	42.17%	19.33%	0.47%	1.44%	11.03%
FI	1.13%	10.21%	26.50%	17.95%	0.16%	44.05%
SE	0.76%	6.47%	24.63%	35.34%	23.16%	9.64%
UK	12.39%	17.82%	41.05%	12.02%	2.02%	14.71%
NO	3.49%	5.22%	25.82%	12.73%	2.88%	49.87%

OTHBENF (Col.250):

	1	2	3	4	5
BE	6.29%	10.95%	1.04%	0.66%	81.06%
BG	8.12%	0.00%	3.48%	0.91%	87.50%
CZ	7.26%	5.24%	1.87%	2.57%	83.06%
DK	12.19%	30.54%	0.00%	0.00%	57.26%
DE	1.53%	2.18%	3.83%	0.34%	92.12%
EE	8.86%	0.00%	0.00%	0.00%	91.14%
IE	15.74%	12.43%	14.10%	0.32%	57.41%
EL	5.17%	1.06%	11.81%	0.88%	81.08%
ES	9.17%	4.47%	3.62%	0.31%	82.44%
FR	2.77%	4.31%	2.12%	0.10%	90.71%
IT	4.17%	5.75%	0.32%	0.62%	89.14%
CY	7.28%	0.00%	7.03%	0.37%	85.32%
LV	4.99%	2.98%	0.95%	0.00%	91.08%
LT	13.65%	1.98%	1.92%	0.57%	81.88%
LU	14.90%	8.32%	0.65%	0.00%	76.14%
HU	9.33%	0.00%	1.36%	0.01%	89.30%
MT	12.41%	4.09%	11.80%	15.59%	56.11%
NL	6.06%	5.42%	7.57%	0.92%	80.04%
AT	7.49%	7.88%	2.75%	0.79%	81.10%
PL	10.54%	8.54%	4.62%	0.18%	76.12%
PT	16.28%	4.03%	0.52%	0.75%	78.42%
RO	9.94%	0.00%	0.87%	0.11%	89.07%
SI	8.26%	0.77%	1.67%	0.81%	88.48%
SK	6.11%	0.00%	1.10%	0.29%	92.51%
FI	16.10%	7.36%	0.00%	0.00%	76.54%
SE	4.81%	3.92%	4.37%	0.83%	86.07%
UK	0.00%	0.00%	13.31%	0.00%	86.69%
NO	29.22%	4.81%	4.12%	8.87%	52.99%

FININCTV (Col.251):

	1	2	3
BE	20.18%	41.61%	38.21%
BG	12.97%	80.70%	6.33%
CZ	9.48%	59.63%	30.88%
DK	29.74%	70.26%	0.00%
DE	12.75%	12.21%	75.04%
EE	18.94%	72.21%	8.85%
IE	14.73%	66.82%	18.45%
EL	63.38%	31.08%	5.53%
ES	24.50%	54.65%	20.85%
FR	32.41%	33.92%	33.67%
IT	2.53%	3.77%	93.71%
CY	13.89%	54.57%	31.54%
LV	6.54%	80.83%	12.63%
LT	14.65%	79.70%	5.65%
LU	7.16%	22.24%	70.60%
HU	18.06%	49.92%	32.02%
MT	13.66%	48.61%	37.73%
NL	10.30%	40.65%	49.05%
AT	26.95%	12.14%	60.90%
PL	12.07%	58.89%	29.04%
PT	14.34%	62.87%	22.79%
RO	18.95%	78.63%	2.42%
SI	9.69%	35.87%	54.44%
SK	14.52%	65.73%	19.75%
FI	13.03%	23.04%	63.93%
SE	12.72%	24.08%	63.20%
UK	11.90%	58.55%	29.55%
NO	14.80%	18.17%	67.03%

YEARSPT (Col.252/253): Employed persons (WSTATOR=1,2)

	00-24	25-29	30-34	35-39	40+
BE	6.51%	11.34%	31.87%	30.53%	19.75%
BG	6.70%	21.98%	41.39%	22.15%	7.78%
CZ	2.41%	13.55%	40.81%	31.12%	12.11%
DK	4.76%	7.81%	18.42%	29.70%	39.31%
DE	13.73%	9.38%	21.34%	28.55%	26.99%
EE	2.17%	9.00%	32.38%	29.01%	27.44%
IE	13.92%	7.95%	23.83%	22.07%	32.23%
EL	19.24%	26.54%	27.04%	14.57%	12.61%
ES	19.14%	10.90%	24.38%	24.40%	21.18%
FR	11.46%	10.81%	31.13%	30.17%	16.43%
IT	13.67%	16.30%	32.89%	25.15%	11.99%
CY	11.15%	12.26%	25.69%	25.49%	25.40%
LV	4.95%	15.20%	35.61%	23.05%	21.19%
LT	5.38%	17.88%	37.32%	23.98%	15.44%
LU	13.80%	13.13%	29.08%	32.49%	11.50%
HU	3.54%	11.88%	38.13%	33.22%	13.23%
MT	2.21%	4.11%	22.46%	39.20%	32.02%
NL	18.40%	11.06%	22.01%	25.20%	23.33%
AT	11.62%	8.58%	23.04%	32.02%	24.74%
PL	7.06%	15.51%	34.65%	27.10%	15.67%
PT	5.18%	6.49%	17.12%	20.97%	50.23%
RO	14.08%	20.40%	34.89%	19.47%	11.17%
SI	7.74%	13.74%	40.30%	32.16%	6.06%
SK	3.23%	18.09%	45.30%	26.88%	6.49%
FI	6.21%	12.92%	29.77%	27.57%	23.53%
SE	3.66%	8.38%	26.10%	27.20%	34.66%
UK	9.18%	9.35%	21.13%	25.67%	34.67%
NO	8.60%	14.73%	28.92%	23.36%	24.39%

YEARSPT (Col.252/253): Not employed persons (WSTATOR=3,5)

	00-24	25-29	30-34	35-39	40+
BE	6.92%	4.99%	17.63%	31.46%	39.00%
BG	4.29%	11.91%	40.97%	34.11%	8.72%
CZ	0.65%	6.02%	26.05%	41.13%	26.15%
DK	7.13%	5.21%	10.20%	16.59%	60.88%
DE	9.08%	4.96%	11.53%	20.75%	53.68%
EE	2.32%	4.24%	17.84%	34.15%	41.46%
IE	15.76%	4.53%	14.16%	16.38%	49.17%
EL	6.64%	11.19%	27.65%	32.10%	22.42%
ES	22.58%	5.97%	16.05%	16.57%	38.83%
FR	10.62%	5.02%	13.35%	27.69%	43.33%
IT	9.71%	6.06%	12.27%	50.50%	21.45%
CY	20.11%	7.85%	14.40%	20.11%	37.52%
LV	3.79%	7.52%	30.50%	35.64%	22.55%
LT	1.58%	7.55%	27.92%	36.32%	26.63%
LU	8.59%	4.09%	12.15%	22.49%	52.68%
HU	4.70%	7.76%	24.56%	39.23%	23.74%
MT	1.98%	2.78%	11.62%	24.19%	59.43%
NL	13.10%	6.23%	12.53%	19.79%	48.34%
AT	6.77%	5.95%	11.97%	29.53%	45.78%
PL	5.79%	7.99%	32.31%	34.65%	19.26%
PT	6.43%	6.23%	15.55%	20.42%	51.36%
RO	7.15%	13.38%	36.95%	31.25%	11.27%
SI	5.40%	4.22%	24.13%	43.61%	22.64%
SK	0.98%	7.88%	31.58%	39.31%	20.25%
FI	8.46%	8.65%	18.94%	25.17%	38.79%
SE	5.67%	5.14%	11.57%	16.40%	61.22%
UK	10.35%	7.47%	14.28%	21.33%	46.56%
NO	12.90%	10.32%	19.36%	19.68%	37.74%

Annex 3

List of variables – Module 2006

Specification of the 2006 ad hoc module on “Transition from work into retirement”

1: all Member States and regions are concerned.

Var. name	2006 Column	Code	Description	Filters
REDUCHRS	240		Person reduced his/her working hours in a move to full retirement	Everybody aged 50-69 and ((WSTATOR=3, 5 and (YEARPR-YEARBIR)>49) or (WSTATOR=1, 2))
		1	Yes, in a progressive retirement scheme/part-time pension	
		2	Yes, but not in a progressive retirement scheme/part-time pension	
		3	No, but plans to do so within the next 5 years	
		4	No, and plans not to do so within the next 5 years/did not do so	
		5	No, and does not know about plans for the next 5 years or plans are not relevant	
		9	Not applicable (not included in the filter)	
		Blank	No answer	
PLAGESTP	241/242		Planned age for stopping all work for pay or profit	Everybody aged 50-69 and ((WSTATOR=3, 5 and (YEARPR-YEARBIR)>49) or (WSTATOR=1, 2))
		50-93	2 digits	
		94	No exact planned age, but it will be before 60 years old	
		95	No exact planned age, but it will be between 60 and 64 years old	
		96	No exact planned age, but it will be at 65 years old or after or plans to work as long as possible	
		97	No exact planned age and does not know at all when it will be	
		98	Has already stopped all work for pay or profit	
		99	Not applicable (not included in the filter)	
		Blank	No answer	
STATAFT	243		Main labour status just after leaving last job or business	Everybody aged 50-69 and WSTATOR=3, 5 and YEARPR-YEARBIR>49
		1	Unemployed	
		2	In retirement or early retirement	
		3	Long term sick or disabled	
		4	Other	
		9	Not applicable (not included in the filter)	
		Blank	No answer	
REASRET	244		Main reason for retirement or early retirement	C243=2
		1	Job lost	
		2	Had reached compulsory retirement age	
		3	Own health or disability	
		4	Care responsibilities	
		5	Problems related to job	
		6	Favourable financial arrangements to leave	
		7	Preference to stop working other than previous codes	
		8	Other	
		9	Not applicable (not included in the filter)	
		Blank	No answer	
FLEXWORK	245		More flexible working time arrangements would have contributed to person staying longer at work/would contribute to person staying longer at work	Everybody aged 50-69 and ((WSTATOR=3, 5 and (YEARPR-YEARBIR)>49) or (WSTATOR=1, 2))
		1	Yes	
		2	No	
		9	Not applicable (not included in the filter)	
		Blank	No answer	

Var. name	2006 Column	Code	Description	Filters
OPPSKILL	246	1 2 9 Blank	More opportunities to update skills would have contributed to person staying longer at work/would contribute to person staying longer at work Yes No Not applicable (not included in the filter) No answer	Everybody aged 50-69 and ((WSTATOR=3, 5 and (YEARPR-YEARBIR)>49) or (WSTATOR=1, 2))
HLTHSAF	247	1 2 9 Blank	Better health and/or safety at workplace would have contributed to person staying longer at work/would contribute to person staying longer at work Yes No Not applicable (not included in the filter) No answer	Everybody aged 50-69 and ((WSTATOR=3, 5 and (YEARPR-YEARBIR)>49) or (WSTATOR=1, 2))
AGEPENS	248/249	97 98 99 Blank	Age at which person started to receive an individual retirement pension 2 digits Does not receive an individual retirement pension even though is entitled to Is not/not yet entitled to an individual retirement pension Not applicable (not included in the filter) No answer	Everybody aged 50-69 and ((WSTATOR=3, 5 and (YEARPR-YEARBIR)>49) or (WSTATOR=1, 2))
OTHBENF	250	1 2 3 4 5 9 Blank	Person receives an individual pension or individual benefits, other than a retirement pension and unemployment benefits, such as a disability pension, a sick pension or an early retirement scheme allowance Yes, a disability pension or a sick pension Yes, an early retirement scheme allowance Yes, another individual benefit not elsewhere classified Yes, combination of codes 1, 2 or 3 No Not applicable (not included in the filter) No answer	Everybody aged 50-69 and WSTATOR=3, 5 and YEARPR-YEARBIR>49
FININCTV	251	1 2 3 9 Blank	Main financial incentive to stay at work To increase retirement pension entitlements To provide sufficient household income No financial incentive Not applicable (not included in the filter) No answer	Everybody aged 50-69 and WSTATOR=1, 2 and C248/249 < 98
YEARSPT	252/253	99 Blank	Number of years spent working for pay or profit (during working life) 2 digits Not applicable (not included in the filter) No answer	Everybody aged 50-69 and ((WSTATOR=3, 5 and (YEARPR-YEARBIR)>49) or (WSTATOR=1, 2))
	254/259	0000-9999 00-99	Weighting factor for the LFS module 2006 (optional) Columns 254-257 contain whole numbers Columns 258-259 contain decimal places	Everybody aged 50-69 and ((WSTATOR=3, 5 and (YEARPR-YEARBIR)>49) or (WSTATOR=1, 2))

Annex 4

Explanatory notes for LFS 2006 ad hoc module on transition from work into retirement

Elaboration of the variables for the LFS module 2006

Three task force meetings were organised in order to build a finalised draft of variables for the LFS module 2006. The task force was composed of nine countries: DK, DE, FR, IT, HU, NL, FI, SE, UK.

Description of the variables for the LFS module 2006

Reminder: The numbering of the variables of the labour force survey in *Filters* (C11/14, C24 and C67/70) refers to Commission Regulation (EC) No 1575/2000.

Target population:

Everybody aged 50-69

- not at work (C24=3, 5) and who worked after 49 years old³

- at work (C24=1, 2)

C240 (REDUCHRS): Person reduced his/her working hours in a move to full retirement

1- Yes, in a progressive retirement scheme/part-time pension

2- Yes, but not in a progressive retirement scheme/part-time pension

3- No, but plans to do so within the next 5 years

4- No, and plans not to do so within the next 5 years/did not do so

5- No, and does not know about plans for the next 5 years or plans are not relevant

9- Not applicable (not included in the filter)

Blank- No answer

Filters

Everybody aged 50-69 and ((C24=3, 5 and (C67/70-C11/14)>49) or (C24=1, 2))

Objective

The aim is to know if persons did or plan to do a gradual move into retirement; if they did, if it was in a “progressive retirement scheme/part-time pension” or not.

Instructions for the survey or for the coding

- This variable does not refer only to the current/past job (e.g. a person can plan to reduce the working hours by taking another job in the future and this should be coded).
- “Progressive retirement scheme/part-time pension”: this measure concerns older employees in some countries. To avoid the exit from work, in case the employee wishes to decrease his/her working time before retiring, he/she could take a part-time job for example. It could be a “classic” part-time or what is called a “progressive retirement scheme/part-time pension”. The latter ensures a better remuneration than the “classic” part-time (e.g. 50% work paid 80%). This is part of measures to keep older employees in employment (incentives to stay at work). In other words, it corresponds to a reduction of the number of hours worked with a less than proportional reduction in salary (e.g. 50% work paid 80%).

³ (C67/70-C11/14)>49

- Reduction of hours worked in a move to full retirement: e.g. if the person worked 50% part-time during the whole working life (or very early in the career), it should be coded “No” (the part-time was not taken in a move to full retirement, not to prepare the retirement).
- Particular case: If a person took a classic part-time AND after that, a progressive retirement in a move to full retirement, it should be coded 1.
- Code 4 includes also persons who plan not to do so within the next 5 years because they can not (e.g. no possibility in the work supply). It also includes persons who did not reduce the working hours in a move to full retirement and who have already stopped all work for pay or profit (with the intention not to return to the labour force).
- Code 5 can also apply for unemployed persons, for persons whose job will stop in the following months or for persons with an uncertain job (“plans are not relevant”).

C241/242 (PLAGESTP): Planned age for stopping all work for pay or profit

50-93 2 digits

94- No exact planned age, but it will be before 60 years old

95- No exact planned age, but it will be between 60 and 64 years old

96- No exact planned age, but it will be at 65 years old or after or plans to work as long as possible

97- No exact planned age and does not know at all when it will be

98- Has already stopped all work for pay or profit

99- Not applicable (not included in the filter)

Blank- No answer

Filters

Everybody aged 50-69 and ((C24=3, 5 and (C67/70-C11/14)>49) or (C24=1, 2))

Objective

It is a prospective variable on the age planned for stopping all work for pay or profit.

Instructions for the survey or for the coding

- Planned age for stopping all work for pay or profit: with the intention not to return to the labour force.
- Code 98: person has stopped working for pay or profit with the intention not to return to the labour force.

C243 (STATAFT): Main labour status just after leaving last job or business

1- Unemployed

2- In retirement or early retirement

3- Long term sick or disabled

4- Other

9- Not applicable (not included in the filter)

Blank- No answer

Filters

Everybody aged 50-69 and C24=3, 5 and (C67/70-C11/14)>49

Objective

This variable aims to get information on pathways between work and retirement by assessing the status just after the exit from last job, and on the differences of pathways between countries.

Instructions for the survey or for the coding

- “Just after leaving last job or business” means “just after the person last worked”.
- The variable is based on self-assessment.
- All the codes can apply for ex employees and ex self-employed.

- “Unemployed”: may include government training, persons waiting to start job ...

C244 (REASRET): Main reason for retirement or early retirement

- 1- Job lost
- 2- Had reached compulsory retirement age
- 3- Own health or disability
- 4- Care responsibilities
- 5- Problems related to job
- 6- Favourable financial arrangements to leave
- 7- Preference to stop working other than previous codes
- 8- Other
- 9- Not applicable (not included in the filter)
- Blank- No answer

Filters

C243 (STATAFT)=2

Objective

This variable aims to get the main factor that made person exit from work (financial factor, personal or “legal” factor ...) using categories of responses more adapted/oriented to older workers.

Instructions for the survey or for the coding

- At the moment of the exit from last job (after the person last worked).
- Code 1: voluntary redundancy not included.
- Code 2: compulsory legal maximum retirement age; person was forced to exit because of his/her age (different from the standard retirement age or the minimum retirement age).
- Code 4: person had to care for children or dependant persons (e.g. lack of care facilities ...).
- Code 5: working time patterns, tasks, health and safety, job stress, too demanding, skills not adequate or not valued, employer’s attitude ...
- Code 6: financial terms to retire early, took voluntary redundancy, prime/compensation from employers, golden handshakes, other early retirement schemes ...
- Code 7: includes preference to stop working for personal or family reasons, persons who did not need to work or preferred not to work... This also includes persons who reached the minimum or standard retirement age (but not the maximum/compulsory), so who could have stayed longer at work but who preferred to stop working.
- If it is really impossible for the interviewed person to choose a “main reason”, the first code that applies in the order of the list should be coded (the first codes refer rather to “obligations” and the last codes rather to “preferences”).

C245 (FLEXWORK): More flexible working time arrangements would have contributed to person staying longer at work/would contribute to person staying longer at work

- 1- Yes
- 2- No
- 9- Not applicable (not included in the filter)
- Blank- No answer

Filters

Everybody aged 50-69 and ((C24=3, 5 and (C67/70-C11/14)>49) or (C24=1, 2))

Objective

This variable deals with a working factor that could have contributed to person staying longer at work/could contribute to person staying longer at work. It aims to know if improvement of this working factor could have made/could make person postpone the exit from work.

Instructions for the survey or for the coding

- “Yes” and “to some extent” are in the same category of response: this means that this aspect would have contributed to person staying at work or would contribute to person staying longer at work. In other words, it may not be the only factor but if it was/is one of them, code 1 should be used.
- “More flexible working time arrangements” includes the possibility of reducing working time, teleworking, changing working hours ...

C246 (OPPSKILL): More opportunities to update skills would have contributed to person staying longer at work/would contribute to person staying longer at work

- 1- Yes
- 2- No
- 9- Not applicable (not included in the filter)
- Blank- No answer

Filters

Everybody aged 50-69 and ((C24=3, 5 and (C67/70-C11/14)>49) or (C24=1, 2))

Objective

This variable deals with a working factor that could have contributed to person staying longer at work/could contribute to person staying longer at work. It aims to know if improvement of this working factor could have made/could make person postpone the exit from work.

Instructions for the survey or for the coding

- “Yes” and “to some extent” are in the same category of response: this means that this aspect would have contributed to person staying at work or would contribute to person staying longer at work. In other words, it may not be the only factor but if it was/is one of them, code 1 should be used.

C247 (HLTHSAF): Better health and/or safety at workplace would have contributed to person staying longer at work/would contribute to person staying longer at work

- 1- Yes
- 2- No
- 9- Not applicable (not included in the filter)
- Blank- No answer

Filters

Everybody aged 50-69 and ((C24=3, 5 and (C67/70-C11/14)>49) or (C24=1, 2))

Objective

This variable deals with a working factor that could have contributed to person staying longer at work/could contribute to person staying longer at work. It aims to know if improvement of this working factor could have made/could make person postpone the exit from work.

Instructions for the survey or for the coding

- “Yes” and “to some extent” are in the same category of response: this means that this aspect would have contributed to person staying at work or would contribute to person staying longer at work. In other words, it may not be the only factor but if it was/is one of them, code 1 should be used.

C248/249 (AGEPENS): Age at which person started to receive an individual retirement pension

- 2 digits
- 97- Does not receive an individual retirement pension even though is entitled to

98- Is not/not yet entitled to an individual retirement pension

99- Not applicable (not included in the filter)

Blank- No answer

Filters

Everybody aged 50-69 and ((C24=3, 5 and (C67/70-C11/14)>49) or (C24=1, 2))

Objective

This variable aims to know if person receives a retirement pension; if no, if she/he is entitled to or not; if yes, when she/he started to receive it (age). This age could be compared to the age of exit from work and could give information on financial aspects.

Instructions for the survey or for the coding

- **“Individual” retirement pension**: only individual/“direct” pensions are included. Pensions from derived rights are excluded; survivor’s pensions/widow’s pensions are therefore excluded.
- **“Retirement pensions”**: Are included own full-time retirement pensions, own part-time pensions/progressive retirement schemes and more generally all “old age pensions” according to the ESSPROS definition. Therefore are included as “retirement pensions” (ESSPROS, in the classification of benefits in the Old Age Function):
 - **Old age pension**: periodic payments intended to i) maintain the income of the beneficiary after retirement from gainful employment at the standard age or ii) support the income of old persons.
 - **Anticipated old age pension**: periodic payments intended to maintain the income of beneficiaries who retire before the standard age as defined in the relevant scheme or in the scheme of reference. This may occur with or without a reduction of the normal pension.
 - **Partial retirement pension**: periodic payment of a portion of the full retirement pension to older workers who continue to work but reduce their working hours or whose income from a professional activity is below a defined ceiling. This may occur before or after standard retirement age. The partial pension is converted into a full pension when the beneficiary retires completely or when he or she ceases to earn professional income above the defined level.
- Are excluded from the definition of “retirement pensions” (ESSPROS, in the classification of benefits in the Disability Function, in the classification of benefits in the Unemployment Function):
 - **Disability pension**: periodic payment intended to maintain or support the income of someone below standard retirement age as established in the reference scheme who suffers from a disability which impairs his or her ability to work or earn beyond a minimum level laid down by legislation.
 - **Early retirement in case of reduced ability to work**: periodic payments to older workers who retire before reaching standard retirement age as established in the reference scheme as a result of reduced ability to work. These payments normally cease when the beneficiary becomes entitled to an old age pension.
 - **Early retirement for labour market reasons**: periodic payments to older workers who retire before reaching standard retirement age due to unemployment or to job reduction caused by economic measures such as the restructuring of an industrial sector or of a business enterprise. These payments normally cease when the beneficiary becomes entitled to an old age pension.

From ESSPROS- Guidelines: ** It is not always possible to establish a single standard retirement age for each country. The age at which old age benefits become payable is fixed by legislation or

by contract, and may vary both among countries and within Member States, according to sector of activity, occupation, gender, and so on. For example, in many countries the standard retirement age for women is lower than that for men, even if it is progressively being brought into line with the latter. The standard retirement age for the self-employed is sometimes higher than that for employees, or, vice versa, civil servants can, in some countries, retire earlier.

Anticipated old age pensions must be identified with reference to the standard retirement age as defined in the relevant scheme, or in the scheme of reference. The following cases fall under the item *Anticipated old age pension*:

- pensions paid to people who work in conditions which are regarded as particularly arduous or unhealthy;
- seniority pensions, paid on condition that a prescribed number of contribution units has been paid or that a defined period of insurance has been completed. Long service rather than old age gives entitlement to the benefit;
- reduced pensions, paid before standard retirement age on condition that a reduction in the value of the pension is accepted.

It is also possible to postpone retirement beyond legal retirement age, normally with an increase in the value of the benefit. The additional amounts paid in case of late retirement must be included under the item *old age pension*.

The old age function does not record all benefits granted in the transition from work to retirement. Some of these may result from social protection provisions other than those linked to old age. Early retirement benefits, in particular, may be paid to older unemployed or disabled workers. These benefits are reported in the Unemployment or Disability functions. These rules underline again that the allocation of benefits to functions needs very careful examination of the exact situations which give rise to payments. **

- Age at which person started to receive it for the first time; this means that if person receives several retirement pensions, among those she/he receives, the age at the first reception should be taken into account.
- Code 97: e.g. includes persons who would be allowed to receive a retirement pension at the moment of the survey but do not receive one because they want to wait in order to increase the remuneration of the future retirement pension.
- Code 98 includes e.g.
 - persons who are not yet entitled to receive a retirement pension because of the age or of another factor, but who have developed/are developing a retirement pension they will receive in the future.
 - persons who haven't developed in the past and are not developing any retirement pension entitlements.

C250 (OTHBENF): Person receives an individual pension or individual benefits, other than a retirement pension and unemployment benefits, such as a disability pension, a sick pension or an early retirement scheme allowance

- 1- Yes, a disability pension or a sick pension
- 2- Yes, an early retirement scheme allowance
- 3- Yes, another individual benefit not elsewhere classified
- 4- Yes, combination of codes 1, 2 or 3
- 5- No
- 9- Not applicable (not included in the filter)
- Blank- No answer

Filters

Everybody aged 50-69 and C24=3, 5 and (C67/70-C11/14)>49

Objective

This variable aims to know if the person receives some kinds of pensions/benefits allowing her/him not to work. This will give information on financial aspects.

Instructions for the survey or for the coding

- All enumerated individual pensions/benefits are included (in general, these pensions are periodic and paid in cash). Retirement pensions are excluded (see definition for C248/249 AGEPENS).
- Sick pensions can be financed by the social security.
- Code 3: another individual benefit not coded 1 and not coded 2, other than a retirement pension or unemployment benefits. E.g. benefits from social assistance (ESSPROS, social benefits in the function social exclusion not elsewhere classified). Are excluded benefits in the survivor's function (e.g. survivor's pensions) and of course benefits in the family/children function and in the housing function.
- It is important that the countries give to EUROSTAT the list of the kinds of pensions/benefits they include according to their national specificities.

C251 (FININCTV): Main financial incentive to stay at work

- 1- To increase retirement pension entitlements
- 2- To provide sufficient household income
- 3- No financial incentive
- 9- Not applicable (not included in the filter)
- Blank- No answer

Filters

Everybody aged 50-69 and C24=1, 2 and C248/249(AGEPENS)<98

Objective

The aim is to know the main financial incentive to stay at work.

Instructions for the survey or for the coding

- Code 1 includes "to increase future retirement pension".
- Code 2 includes "to meet the current financial needs of the household".
- If it is really impossible for the interviewed person to choose between code 1 and code 2, then code 1 should be coded (order of the list).

C252/253 (YEARSPT): Number of years spent working for pay or profit (during working life)

- 2 digits
- 99- Not applicable (not included in the filter)
- Blank- No answer

Filters

Everybody aged 50-69 and ((C24=3, 5 and (C67/70-C11/14)>49) or (C24=1, 2))

Objective

The aim is to get an approximate measure of the duration of the working career.

Instructions for the survey or for the coding

- This variable is identical to a variable in the EU-SILC.
- It is implicit that an approximate measure is accepted.

- Career breaks are excluded; parental leave is also excluded. Maternity/paternity leave and temporary disability are not considered as career breaks (see below).
- When a person had a job, but was temporarily absent because of maternity leave, injury or temporary disability, slack work for technical or economical reasons ... the related period is to be included.
- Should be recorded the number of years, since starting the first significant job, the person has spent working for pay or profit, whether as an employee or self-employed.
- First significant job: vacation jobs taken by students, from which they return to studies or to other non-work situations are disregarded, as are also other casual jobs undertaken from time to time. Part-time jobs the person may have engaged in while still in school or university are not included. This is partly a subjective definition (self-assessment); on the other hand, the aim is to get an *approximate* measure of the duration of the working career.

Annex 5

Draft proposal for a questionnaire for the LFS 2006 ad hoc module on transition from work into retirement

Given the fact that in the LFS face to face as well as telephone interviewing is applied, questions should be applicable in both situations so that, as far as possible, the two modes of interviewing will deliver comparable data. The proposal is therefore to break down the variables into questions gradually. The proposal should be adapted in case of proxy.

This draft proposal for a questionnaire and codifications includes comments from the task force LFS module 2006. Nevertheless, this draft could still be improved by the comments of the countries. The countries are therefore invited to share their experience of developing the questions for the LFS module 2006 and to send their comments to Eurostat.

Notes:

- The questions do not follow the order of the variables.
- There is no obligation to implement precisely the proposed questionnaire but when the structure of the specific national LFS survey permits it, it could be followed.
- For paper questionnaires, in order to improve the readability, the following proposal could be split in 2 sub-questionnaires depending on the labour situation of the persons: one for the persons at work (24=1, 2) and one for persons not at work but who have worked after 49 years old (C24=3, 5 and (C67/70-C11/14) >49)).
- Note that C67/70 will be changed into C82/85 in the new regulation. Nevertheless, C67/70 is used here since this reference had to be used in the regulation.

F1	FILTER 1										
	If person aged 50-69 and 24=1, 2 → Q1 If person aged 50-69 and (C24=3, 5 and (C67/70-C11/14) >49 ⁴) → Q1 Else → END										
	<p><u>C248/249 (AGEPENS)</u></p> <p>Q1 Do you receive an individual retirement pension? <i>(Are defined as individual retirement pensions own full-time pensions but also own part-time pensions/progressive retirement schemes. Are excluded partner's pensions, survivor's pensions, unemployment benefits and other early retirement scheme allowances -excluding also disability and sick pensions before the standard age of retirement).</i></p> <p>1. Yes 2. No Blank- No answer</p> <table border="1" style="float: right; margin-left: 20px;"> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px; text-align: center;">1</td><td style="width: 20px;"></td></tr> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px; text-align: center;">2</td><td style="width: 20px;">→ Q3</td></tr> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px;">→ Q4</td></tr> </table>			1			2	→ Q3			→ Q4
	1										
	2	→ Q3									
		→ Q4									
	<p>Q2 At which age did you receive your first individual retirement pension?</p> <table border="1" style="float: right; margin-left: 20px;"> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px;"></td></tr> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px;">→ Q4</td></tr> </table>							→ Q4			
		→ Q4									
	<p>Q3 You do not receive an individual retirement pension. But are you entitled to receive an individual retirement pension (even partial)?</p> <p>1. Yes, you would be allowed to receive an individual retirement pension if you wanted to 2. No, you would not or not yet be allowed to receive an individual retirement pension Blank- No answer</p> <table border="1" style="float: right; margin-left: 20px;"> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px; text-align: center;">1</td><td style="width: 20px;"></td></tr> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px; text-align: center;">2</td><td style="width: 20px;"></td></tr> </table>			1			2				
	1										
	2										
	<p><u>C252/253 (YEARSPT)</u></p> <p>Q4 In total, how many years have you spent working for pay or profit in your working life?</p> <table border="1" style="float: right; margin-left: 20px;"> <tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px;"></td></tr> </table>										

⁴ =has worked after 49 years old (reference CR N°1575/2000). This condition is not repeated in the other filters but is of course implicit (F1 = first filter; if C24=3, 5 and if this condition is not fulfilled, it is the end of the interview).

(approximate expected)

F2 FILTER 2

If C24=1, 2 → Q5
If C24=3, 5 → FQ1

C241/242 (PLAGESTP)

Q5 At which age do you plan to stop all work for pay or profit?
50-93 2 digits
94 Does not know exactly
95 Plans to work as long as possible

F3 FILTER 3

If Q5=94 → Q5a
Else → F4

Q5a You do not know yet precisely at which age you will stop. But approximately, do you think you will stop all work for pay or profit ...

- 1. Before 60 years old
- 2. Between 60 and 64 years old
- 3. At 65 years old or after
- 4. Does not know at all when it will be
- Blank- No answer

	1
	2
	3
	4

→ F4

FQ1 Person has already stopped all work for pay or profit (with the intention not to return to the labour force)

- 1. Yes
- 2. No
- Blank- No answer

	1
	2

→ Q8

→ Q8

Q6 At which age do you plan to stop all work for pay or profit?

- 50-93 2 digits
- 94- No exact planned age, but it will be before 60 years old
- 95- No exact planned age, but it will be between 60 and 64 years old
- 96- No exact planned age, but it will be at 65 years old or after or plans to work as long as possible
- 97- No exact planned age and does not know at all when it will be
- Blank- No answer

--	--

→ Q8

F4 FILTER 4

If C24=1, 2 and (Q2 not equal to Blank or Q3=1) → Q7
Else → Q10

C251(FININCTV)

Q7 Do you have a financial incentive that makes you stay at work?

- 1. Yes
- 2. No
- Blank- No answer

	1
	2

→ Q10

→ Q10

Q7a Is it mainly to provide sufficient household income at present or to increase your retirement pension entitlements?

- 1. To provide sufficient household income
- 2. To increase your retirement pension entitlements
- Blank- No answer

	1
	2

→ Q10

C243 (STATAFT)

Q8 Let's talk about your last job or business.

What was your situation just after you left your last job or business?

- 1. Unemployed

	1
--	---

→ F5

- 2. In retirement or early retirement
- 3. Long term sick or disabled
- 4. Other
- Blank- No answer

	2
	3
	4

→ F5
→ F5
→ F5

C244 (REASRET)

Q9 What was the main reason for leaving for retirement or early retirement? -list

- 1. Job lost
- 2. Had reached compulsory retirement age
- 3. Own health or disability
- 4. Care responsibilities
- 5. Problems related to job
- 6. Favourable financial arrangements to leave
- 7. Preference to stop working other than previous codes⁵
- 8. Other

Blank- No answer

	1
	2
	3
	4
	5
	6
	7
	8

→ F5

C240 (REDUCHRS)

Q10 Have you reduced your working hours in a move to full retirement?

- 1. Yes
- 2. No (including not yet).....

Blank- No answer

	1
	2

→ Q12

→ Q13

Q10a Do you plan to reduce your working hours in a move to full retirement within the next 5 years?

- 1. Yes, you plan to do so within the next 5 years
- 2. No, you plan not to do so within the next 5 years
- 3. You do not know about plans for the next 5 years or plans are not relevant ⁶

Blank- No answer

	1
	2
	3

→ Q13

F5

FILTER 5

If FQ1=1 → **Q11**

If FQ1=2, Blank → **Q11a**

Q11 Did you reduce your working hours in a move to full retirement?

- 1. Yes
- 2. No

Blank- No answer

	1
	2

→ Q12

→ Q14

→ Q14

Q11a Did you reduce your working hours in a move to full retirement?

- 1. Yes
- 2. No, but you plan to do so within the next 5 years
- 3. No, and you plan not to do so within the next 5 years
- 4. No, and you do not know about plans for the next 5 years or plans are not relevant ⁷

Blank- No answer

	1
	2
	3
	4

→ Q12

→ Q14

→ Q14

→ Q14

→ Q14

Q12 You reduced your working hours in a move to full retirement. Did you take a progressive retirement scheme/part-time pension?

(A "progressive retirement scheme/part-time pension" is a way to reduce the working hours with a less than proportional reduction in the salary, e.g. 50% work paid 80%).

- 1. Yes
- 2. No

	1
	2

⁵ Includes also persons who reached the minimum or standard retirement age (but not the maximum/compulsory), so who could have stayed longer at work but who preferred to stop working.

⁶ "Plans are not relevant": can apply for persons whose job will stop in the following months, persons with an uncertain job...

⁷ "Plans are not relevant": can apply for unemployed persons.

Blank- No answer

--	--

F6

FILTER 6

If C24=1, 2 → Q13

If C24=3, 5 → Q14

C245 (FLEXWORK) / 246 (OPPSKILL) / 247 (HLTHSAF)

Q13 Would the followings contribute to make you stay longer at work?

→ Q13a

Q14 Would the followings have contributed to make you stay longer at work?

→ Q13a

Q13a More flexible working time arrangements?

1. Yes (including to some extent)

2. No

Blank- No answer

	1
	2

Q13b More opportunities to update skills?

1. Yes (including to some extent)

2. No

Blank- No answer

	1
	2

Q13c Better health and/or safety at workplace?

1. Yes (including to some extent)

2. No

Blank- No answer

	1
	2

F7

FILTER 7

If C24=3, 5 → Q15

Else → END

C250 (OTHBENF)

Q15 Do you receive an individual pension or individual benefits, other than a retirement pension and unemployment benefits, such as a disability pension, a sick pension or an early retirement scheme allowance? –national list-

1. Yes, a disability pension or a sick pension

2. Yes, an early retirement scheme allowance

3. Yes, another individual benefit⁸

4. Yes, combination of codes 1, 2 or 3

5. No

Blank- No answer

	1
	2
	3
	4
	5

→ END

⁸ National list; see description of the variable to know what should be included or excluded.

Annex 6

Codification in order to obtain the variables for the LFS module 2006

C240 (REDUCHRS)

Code	Codification of the questions
1	Q12=1
2	Q12=2
3	Q10a=1 or Q11a=2
4	Q10a=2 or Q11a=3 or Q11=2
5	Q10a=3 or Q11a=4
9	(Person aged less than 50 or more than 69) OR (C24=4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old ⁹)
blank	Other case (no answer / does not know)

C241/242 (PLAGESTP)

Code	Codification of the questions
50-93	Q5=50 to 93 or Q6=50 to 93
94	Q5a=1 or Q6=94
95	Q5a=2 or Q6=95
96	Q5a=3 or Q6=96 or Q5=95
97	Q5a=4 or Q6=97
98	FQ1=1
99	(Person aged less than 50 or more than 69) OR (C24=4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old)
blank	Other case (no answer / does not know)

C243 (STATAFT)

Code	Codification of the questions
1	Q8=1
2	Q8=2
3	Q8=3
4	Q8=4
9	(Person aged less than 50 or more than 69) OR (C24=1, 2, 4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old)
blank	Other case (no answer / does not know)

C244 (REASRET)

Code	Codification of the questions
1	Q9=1
2	Q9=2
3	Q9=3
4	Q9=4
5	Q9=5
6	Q9=6
7	Q9=7
8	Q9=8
9	(Person aged less than 50 or more than 69) OR (C24=1, 2, 4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old) OR (person aged 50-69 and C24=3, 5 and has worked after 49 years old and C243(STATAFT)=1, 3, 4, Blank)
blank	Other case (no answer / does not know)

C245 (FLEXWORK)

Code	Codification of the questions
1	Q13a=1
2	Q13a=2
9	(Person aged less than 50 or more than 69) OR (C24=4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old)
blank	Other case (no answer / does not know)

C246 (OPPSKILL)

Code	Codification of the questions
------	-------------------------------

⁹ Has worked after 49 years old= (C67/70-C11/14) >49.

1	Q13b=1
2	Q13b=2
9	(Person aged less than 50 or more than 69) OR (C24=4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old)
blank	Other case (no answer / does not know)

C247 (HLTHSAF)

Code	Codification of the questions
1	Q13c=1
2	Q13c=2
9	(Person aged less than 50 or more than 69) OR (C24=4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old)
blank	Other case (no answer / does not know)

C248/249 ((AGEPENS)

Code	Codification of the questions
2 digits	Q2
97	Q3=1
98	Q3=2
99	(Person aged less than 50 or more than 69) OR (C24=4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old)
blank	Other case (no answer / does not know)

C250 (OTHBENF)

Code	Codification of the questions
1	Q15=1
2	Q15=2
3	Q15=3
4	Q15=4
5	Q15=5
9	(Person aged less than 50 or more than 69) OR (C24=1, 2, 4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old)
blank	Other case (no answer / does not know)

C251 (FININCTV)

Code	Codification of the questions
1	Q7a=2
2	Q7a=1
3	Q7=2
9	(Person aged less than 50 or more than 69) OR (C24=3, 4, 5, Blank) OR (person aged 50-69 and C24=1, 2 and C248/249=98, Blank)
blank	Other case (no answer / does not know)

C252/253 (YEARSPT)

Code	Codification of the questions
2 digits	Q4
99	(Person aged less than 50 or more than 69) OR (C24=4, Blank) OR (person aged 50-69 and C24=3, 5 and has not worked after 49 years old)
blank	Other case (no answer / does not know)

NOTE: The weighting factors for the module (C254/259) should be filled whether the coefficients are specific to the module or equivalent to the core coefficients.

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