



HELLENIC REPUBLIC



MINISTRY OF ECONOMY AND FINANCE



**GENERAL SECRETARIAT OF  
THE NATIONAL STATISTICAL SERVICE  
OF GREECE**

## **TRANSITION FROM WORK TO RETIREMENT**

LABOUR FORCE SURVEY – AD HOC MODULE 2006

### **FINAL QUALITY REPORT**

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## **1. Introduction**

In 2005, Grant Agreement N<sup>o</sup>. 32100.2005.004-2005-264 was signed between the European Community, represented by the Commission of the European Communities and the National Statistical Service of Greece. Under the rules and conditions of this agreement, National Statistical Service of Greece will receive a grant from the European Commission in order to implement the 2006 Ad-hoc Module on “Transition from work into retirement”.

The variables to be collected in the ad hoc module were laid down in Commission Regulation No 388/2005 of 8 March 2005,

The first aim of ad hoc module was to know how the transition at the end of the career towards full retirement is expected to take place/takes place/took place, and in particular to collect information on:

- 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.

## **2. Target population of Ad hoc module on transition from work to retirement**

Target population of the Quarterly LFS comprises of all persons that are living in private households. Therefore, the survey does not cover persons that live in collective households (hospitals, hotels, prisons, etc., or persons doing compulsory military service).

Ad hoc module on transition from work to retirement addressed to a subset of that population, and in particular:

- To persons age 50 – 69 years old that they were working (or had a job from which they were temporarily absent) during reference week, or

- To persons age 50 – 69 years old that had worked in the past, and the year they worked for the last time were 50 years old or more

The age of the respondents at the time they last worked was computed as the difference between the year they last worked and the year of their birth.

### **3. Sampling design and sample selection**

Ad – hoc module's sample was based on LFS sample.

LFS sample is a sample of households that are selected with a two stage procedure. In the first stage, clusters of households are selected from 182 strata. These strata are formed in every NUT III area by allocating municipalities and communes in three different groups (Agglomerations and Municipalities with 10.000 inhabitants or more, Municipalities and Communes with 2.000 to 9.999 inhabitants, and Communes up to 1.999 inhabitants). The exceptions are Athens and Thessaloniki agglomerations, which were divided into 31 and 9 strata, respectively.

During this first stage, 2640 primary sampling units are selected (with probability proportional to their “size” (that is, proportional to the number of households residing in these areas at 2001 census).

During the second sampling stage, in every primary sampling unit of final stratum, a systematic sample of household is selected. All persons, living in these households and satisfying the above described criteria, were interviewed for the ad hoc survey.

The sample size for the ad hoc module was 14,018 persons, belonging to 11,145 different households were interviewed. Interviews were contacted together with interviews for main Labour Force Survey, during the second quarter of 2006.

### **4. Non response and proxies**

Unit non response rates for 2006 module follow the non-response rates for the main Labour Force Survey, since the two surveys were contacted at the same time. Unit non response rates for NUT II areas are presented in the following table. Non response is higher in Attiki

(where the agglomeration of Athens belongs) and in Kentriki Makedonia (where the agglomeration of Thessaloniki belongs)

NUT II REGION	NON RESPONSE RATE
GR11 Anatoliki Makedonia, Thraki	6,65
GR12 Kentriki Makedonia	10,94
GR13 Dytiki Makedonia	3,75
GR14 Thessalia	5,29
GR21 Ipeiros	5,29
GR22 Ionia Nisia	5,32
GR23 Dytiki Ellada	4,69
GR24 Sterea Ellada	3,07
GR25 Peloponnisos	4,41
GR30 Attiki	20,43
GR41 Voreio Aigaio	6,21
GR42 Notio Aigaio	4,2
GR43 Kriti	7,82

Total percentage of proxies, for persons included in ad hoc module, was 37.2%. The highest percentage of proxies was in men, aged 50 – 54 and the lowest was in women, aged 65 – 69.

Age	Males			Females		
	Total Persons interviewed	Proxies	%proxies	Total Persons interviewed	Proxies	%proxies
50 - 54	2316	1082	46,7	1369	416	30,4
55 - 59	2326	1042	44,8	1244	362	29,1
60 - 64	1888	770	40,8	1117	329	29,5
65 - 69	2272	823	36,2	1486	400	26,9
TOTAL	8802	3717	42,2	5216	1507	28,9

## 5. Weighting and Estimation

For the estimation of the ad hoc survey results, the same weights as in Quarterly LFS were used. These weights are computed in 3 steps.

In the first step, a design weight is assigned to each person in the data file. This weight is determined by the estimated probability of selection of the particular household where the person lives in.

At the second step, a correction factor is applied at primary sampling unit level to compensate for non-response.

Finally, at the third step, post stratification weights are applied to individual level. Post-stratification variables are sex, age (5-years groups) and NUT II area.

## 6.Frequencies by variable

C240		Frequency	Percent
Valid	No answer	535	3,82
	2	517	3,69
	3	435	3,10
	4	11121	79,33
	5	1410	10,06
	Total	14018	100,00
C241_2		Frequency	Percent
Valid	No answer	567	4,04
	52	3	0,02
	53	2	0,01
	54	1	0,01
	55	24	0,17
	56	5	0,04
	57	7	0,05
	58	53	0,38
	59	7	0,05
	60	138	0,98
	61	8	0,06
	62	11	0,08
	63	6	0,04
	64	20	0,14
	65	754	5,38
	66	8	0,06
	67	6	0,04
	68	4	0,03
	70	18	0,13
	72	2	0,01
	75	1	0,01
	94	516	3,68
	95	2271	16,20
	96	2226	15,88
	97	1548	11,04
	98	5812	41,46
	Total	14018	100,00
C243		Frequency	Percent
Valid	No answer	343	2,45
	1	234	1,67
	2	4471	31,89
	3	431	3,07
	4	567	4,04
	9	7972	56,87
	Total	14018	100,00
C244		Frequency	Percent
Valid	No answer	18	0,13
	1	8	0,06
	2	2674	19,08
	3	59	0,42
	4	11	0,08
	5	5	0,04
	6	12	0,09
	7	1646	11,74
	8	38	0,27
	9	9547	68,11
	Total	14018	100,00
C245		Frequency	Percent
Valid	No answer	1559	11,12
	1	1058	7,55
	2	11401	81,33
	Total	14018	100,00

C246		Frequency	Percent
Valid	No answer	1465	10,45
	1	821	5,86
	2	11732	83,69
	Total	14018	100,00
C247			
		Frequency	Percent
Valid		1647	11,75
	1	1410	10,06
	2	10961	78,19
	Total	14018	100,00
C248_9			
	No answer	Frequency	Percent
Valid	41	1	0,01
	42	2	0,01
	44	2	0,01
	45	3	0,02
	46	2	0,01
	48	1	0,01
	49	1	0,01
	50	190	1,36
	51	133	0,95
	52	132	0,94
	53	154	1,10
	54	168	1,20
	55	326	2,33
	56	232	1,66
	57	210	1,50
	58	399	2,85
	59	268	1,91
	60	517	3,69
	61	239	1,70
	62	184	1,31
	63	120	0,86
	64	89	0,63
	65	1355	9,67
	66	152	1,08
	67	42	0,30
	68	31	0,22
	69	5	0,04
	97	1704	12,16
	98	6349	45,29
	Total	13011	92,82
Missing	System	1007	7,18
Total		14018	100,00
C250			
		Frequency	Percent
Valid	No answer	831	5,93
	1	271	1,93
	2	64	0,46
	3	587	4,19
	4	46	0,33
	5	4247	30,30
	9	7972	56,87
	Total	14018	100,00
C251			
		Frequency	Percent
Valid		290	4,60
	1	1160	6,00
	2	544	3,82
	3	100	0,52
	9	11924	85,06
	Total	14018	100,00

C252_3			
		Frequency	Percent
Valid	1	21	0,15
	2	9	0,06
	3	12	0,09
	4	9	0,06
	5	8	0,06
	6	11	0,08
	7	10	0,07
	8	13	0,09
	9	10	0,07
	10	69	0,49
	11	22	0,16
	12	29	0,21
	13	14	0,10
	14	26	0,19
	15	130	0,93
	16	63	0,45
	17	55	0,39
	18	87	0,62
	19	55	0,39
	20	449	3,20
	21	138	0,98
	22	197	1,41
	23	176	1,26
	24	150	1,07
	25	786	5,61
	26	522	3,72
	27	309	2,20
	28	568	4,05
	29	289	2,06
	30	1659	11,83
	31	509	3,63
	32	606	4,32
	33	476	3,40
	34	370	2,64
	35	1670	11,91
	36	522	3,72
	37	305	2,18
	38	364	2,60
	39	167	1,19
	40	968	6,91
	41	192	1,37
	42	179	1,28
	43	151	1,08
	44	123	0,88
	45	407	2,90
	46	137	0,98
	47	64	0,46
	48	62	0,44
	49	37	0,26
	50	109	0,78
	51	11	0,08
	52	18	0,13
	53	23	0,16
	54	3	0,02
	55	11	0,08
	56	5	0,04
	Total	13385	95,48
	No answer	633	4,52
Total		14018	100,00



## 7. Estimated confidence intervals and coefficients of variation, by variable

Standard errors were computed by SPSS' s Complex Samples procedure, taking in to account the stratification and clustering of the sample

C240		Estimate	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		69090	61572	76607	0,055
	2	57923	51070	64776	0,060
	3	53831	47383	60279	0,061
	4	1442636	1407256	1478016	0,013
	5	170497	157927	183067	0,038
	Total	1793977	1756479	1831475	0,011

C241_2		Estimate (mean age)	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		63,77	63,68	63,86	0,001

C243		Estimate	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		44429	38698	50160	0,066
	1	32122	27529	36716	0,073
	2	550621	533429	567813	0,016
	3	52717	46610	58824	0,059
	4	72364	65211	79517	0,050
	Total	752253	731935	772571	0,014

C244		Estimate	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		2353	1006	3701	0,292
	1	1282	299	2264	0,391
	2	329598	314886	344311	0,023
	3	7265	4957	9573	0,162
	4	2014	788	3240	0,310
	5	593	38	1148	0,477
	6	1750	603	2898	0,334
	7	201360	189220	213500	0,031
	8	4406	2658	6155	0,202
	Total	550621	535328	565914	0,014

C245		Estimate	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
Population Size		200070	185407	214734	0,037
	1	135616	123664	147568	0,045
	2	1458291	1422841	1493741	0,012
	Total	1793977	1756479	1831475	0,011

C246		Estimate	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		187910	173994	201827	0,038
	1	107197	96395	117999	0,051
	2	1498870	1463062	1534677	0,012
	Total	1793977	1756479	1831475	0,011

C247		Estimate	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		211995	196747	227243	0,037
	1	178963	164717	193210	0,041
	2	1403019	1367667	1438371	0,013
	Total	1793977	1756479	1831475	0,011

C248_249		Estimate (mean age)	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		59,40	59,24	59,55	0,001

C250		Estimate	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
Population Size		106233	97120	115345	0,044
	1	33416	29009	37823	0,067
	2	6856	4912	8800	0,145
	3	76274	67271	85277	0,060
	4	5710	3426	7995	0,204
	5	523764	504895	542634	0,018
	Total	752253	731935	772571	0,014

C251		Estimate	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		37369	32547,18	42191,48	0,066
	1	143081	132848,2	153314,5	0,036
	2	70068	62571,15	77564,23	0,055
	3	12345	9513,581	15176,61	0,117
	Total	262863	251952,9	273774,1	0,021

C252_3		Estimate (mean years)	95% Confidence Interval		Coefficient of Variation
			Lower	Upper	
		31,51	31,32	31,70	0,003

## 8. Main Results by variable

C240

	SEX		Total
	Male	Female	
C240	3,1%	5,2%	3,9%
2	2,3%	4,8%	3,2%
3	3,0%	3,0%	3,0%
4	81,9%	78,0%	80,4%
5	9,7%	9,1%	9,5%
Total	100,0%	100,0%	100,0%

6.4% of the respondents had reduced (or plan to do so in the next 5 years) their working hours. This percentage is slightly higher in the case of women

		Professional status				Total
		Self employed with employees	Self employed without employees	Employees	Unpaid family workers	
C240	2	2,5%	4,8%	1,6%	11,1%	3,4%
	3	4,8%	6,5%	2,0%	7,5%	4,3%
	4	73,9%	71,3%	84,1%	60,4%	76,9%
	5	18,7%	17,4%	12,3%	20,9%	15,4%
Total		100,0%	100,0%	100,0%	100,0%	100,0%

In the case of people still in employment, the percentage of persons that reduced (or plan to do so in the next 5 years) is higher among persons that work in the family business and the self employed without employees.

C241\_242

The mean planned retirement age is estimated at 63.8 years.

As we see in the next tables, there are slight differences in the planned retirement age for different groups of respondents:

Male	Female
63,90	63,51

Self employed with employees	Self employed without employees	Employees	Unpaid family workers
64,51	64,45	63,01	64,49

Tertiary	Secondary	Primary	Did not go to school
63,30	63,55	64,16	64,44

## C243

Concerning persons who were unemployed when left their last job, almost 60% remain unemployed. (For males this percentage is considerably higher – 74.8%). In all other cases (retired, disabled, etc) the overwhelming majority (96.7% to 99.6%) remain inactive.

		Labour status at reference week		Total
		unemployed	Inactive	
Male		12,6%	87,4%	100,0%
	1	74,8%	25,2%	100,0%
	2	,4%	99,6%	100,0%
	3	,7%	99,3%	100,0%
	4	3,8%	96,2%	100,0%
Female		8,5%	91,5%	100,0%
	1	41,8%	58,2%	100,0%
	2	,4%	99,6%	100,0%
	3		100,0%	100,0%
	4	3,1%	96,9%	100,0%
Total		10,5%	89,5%	100,0%
	1	59,5%	40,5%	100,0%
	2	,4%	99,6%	100,0%
	3	,4%	99,6%	100,0%
	4	3,3%	96,7%	100,0%

## C244

The main reasons for retirement seems to be reaching the compulsory retirement age and preference to stop working (59.9% and 36.6%, respectively). Differences between men and women are not statistically significant, while there are significant differences in the behavior of persons with different educational level. In particular, persons of lower educational level tend to retire because they reached compulsory retirement age, while persons of higher educational level tend to retire because they prefer to stop working.

	male	female	Total
C244	,3%	,6%	,4%
1	,3%	,1%	,2%
2	60,8%	58,2%	59,9%
3	1,1%	1,8%	1,3%
4	,1%	,8%	,4%
5	,1%	,1%	,1%
6	,3%	,3%	,3%
7	36,3%	37,1%	36,6%
8	,6%	1,1%	,8%
Total	100,0%	100,0%	100,0%

	EDUCATIONAL LEVEL				Total
	Tertiary	Secondary	Primary	Did not go to school	
C244	,8%	,6%	,2%	1,3%	,4%
1		,4%	,2%		,2%
2	56,2%	55,0%	62,4%	69,5%	59,9%
3	,2%	1,3%	1,5%	3,0%	1,3%
4	,4%	,4%	,3%		,4%
5		,2%	,1%		,1%
6	,3%	,9%	,1%	,5%	,3%
7	41,6%	40,7%	34,0%	25,3%	36,6%
8	,6%	,4%	1,1%	,3%	,8%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

## C245

7.6% of the respondents believe that flexible working time arrangements would contribute to stay longer at their jobs. There are minor differences between men and women, and between people with different educational background, but these differences are not statistically significant.

	male	female	Total
C245	10,4%	12,4%	11,2%
1	8,0%	6,8%	7,6%
2	81,6%	80,8%	81,3%
Total	100,0%	100,0%	100,0%

	EDUCATIONAL LEVEL				Total
	Tertiary	Secondary	Primary	Did not go to school	
C245	10,3%	12,2%	11,0%	9,6%	11,2%
1	8,0%	8,1%	7,1%	5,6%	7,6%
2	81,7%	79,7%	81,8%	84,8%	81,3%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

## C246

6% of the respondents believe that more opportunities to update skills would contribute to stay longer at their jobs. This percentage is slightly higher for persons of higher educational level.

	A07		Total
	male	female	
C246	9,7%	11,8%	10,5%
1	6,3%	5,4%	6,0%
2	84,0%	82,7%	83,6%
Total	100,0%	100,0%	100,0%

	EDUCATIONAL LEVEL				Total
	Tertiary	Secondary	Primary	Did not go to school	
C246	9,3%	12,0%	10,2%	9,1%	10,5%
1	7,0%	6,3%	5,4%	5,0%	6,0%
2	83,7%	81,7%	84,4%	85,9%	83,6%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

## C247

Better health and safety conditions seems to be the more important factor that could contribute in staying more years in job: 10% of the respondents think that they would stay more years in their job with better health and safety conditions. The percentage is higher for men than women, and higher for persons with lower educational level.

	A07		Total
	male	female	
C247	11,1%	13,1%	11,8%
1	10,9%	8,3%	10,0%
2	78,0%	78,6%	78,2%
Total	100,0%	100,0%	100,0%

	EDUCATIONAL LEVEL				Total
	Tertiary	Secondary	Primary	Did not go to school	
C247	10,8%	13,2%	11,5%	9,9%	11,8%
1	7,6%	9,3%	11,2%	10,4%	10,0%
2	81,6%	77,4%	77,2%	79,7%	78,2%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

## C28\_249

Mean "retirement" age varies from 54.31 years (for persons that worked in armed forces) to 64.19% (for persons that worked as skilled agricultural and fishery workers). It is higher for men, with the exception of skilled agricultural and fishery workers, and legislators, senior officials and managers.

Mean age at witch the respondent start receiving a pension by occupation at the present or the last job

Occupation	male	female
(worked for the last time before 8 years		
0	56,54	56,16
	54,31	.
1	60,95	61,71
2	59,49	57,03
3	56,92	56,82
4	58,20	57,12
5	58,98	58,90
6	64,19	64,89
7	59,85	57,64
8	59,89	58,60
9	60,47	59,02

## C250

16,2% of the respondents receives a pension or benefit, other than retirement pension. There are no significant differences between men and women. From persons that do not receive a retirement pension, 29.3 receive another kind of pension or benefit, while 41.8% don't.

	A07		Total
	male	female	
C250	13,3%	15,3%	14,1%
1	4,2%	4,8%	4,4%
2	,9%	,9%	,9%
3	10,8%	9,2%	10,1%
4	,8%	,7%	,8%
5	70,0%	69,1%	69,6%
Total	100,0%	100,0%	100,0%

	Person do not receive a retirement pension	Person receives a retirement pension	Total
C250	28,9%	9,4%	14,1%
1	18,4%		4,4%
2	3,8%		,9%
3	4,0%	12,1%	10,1%
4	3,1%		,8%
5	41,8%	78,5%	69,6%
Total	100,0%	100,0%	100,0%

## C251

The main reason for working more (though they receive a pension or have establish the right to receive one) is to increase retirement entitlements. This is more evident to persons with lower educational level.

			Total
	male	female	
C251	11,6%	19,9%	14,2%
1	56,5%	49,9%	54,4%
2	27,2%	25,4%	26,7%
3	4,7%	4,7%	4,7%
Total	100,0%	100,0%	100,0%

	EDUCATIONAL LEVEL				Total
	Tertiary	Secondary	Primary	Did not go to school	
C251	8,6%	20,3%	13,9%	3,2%	14,2%
1	49,1%	48,0%	61,2%	65,4%	54,4%
2	35,5%	27,7%	21,1%	17,2%	26,7%
3	6,8%	4,0%	3,7%	14,2%	4,7%
Total	100,0%	100,0%	100,0%	100,0%	100,0%

The mean number of years spent working is 31.5. Is higher for men than women, and higher for lower educational level. Considering different occupations, we see that skilled agricultural and fishery workers have the maximum number of “job years” while the minimum is for elementary occupations.

**Mean number of “work years” by sex**

male	32,5
female	29,8
Total	31,5

**Mean number of “work years” by educational level**

Tertiary	28,7
Secondary	30,1
Primary	33,2
Did not go to school	35,7

**Mean number of “work years” by occupation (in present or last job)**

(worked for the last time before 8 years	31,9
0	31,0
1	30,1
2	28,7
3	29,9
4	29,1
5	28,2
6	36,7
7	31,6
8	31,5
9	27,3
Group Total	31,5



## 9.Coherence

Ad hoc module provides (through C248/249) an estimation for the number of persons that are receiving a pension. In the main questionnaire of Greek LFS, the information on the organization that covers the respondent is collected. Data about the number and the age of persons receiving pension, were available from IKA (which is the largest Social Security Organisation in Greece) but only for year 2003. Next table, presents the relevant figures.

AD HOC RESULTS				DATA FROM IKA	
AGE	MALE	95% CONFIDENCE INTERVAL			MALE
50	323	-149	795		101
51	199	-191	588		205
52	0				259
53	261	-47	569		356
54	592	-17	1200		379
55	1283	519	2048		554
56	1324	415	2233		957
57	1812	677	2948		1316
58	4291	2423	6159		2252
59	8446	6194	10699		5132
60	9410	6733	12087		5400
61	13948	10850	17046		8453
62	11831	8697	14966		8896
63	12243	9382	15104		12585
64	11989	9288	14690		12541
65	14779	12092	17465		13869
66	16422	13452	19393		14893
67	17646	14557	20734		15972
68	20140	16696	23585		15811
69	19743	16220	23265		16916
TOTAL	166682	158888	174478		136847
AGE	FEMALE	95% CONFIDENCE INTERVAL			FEMALE
50	0				299
51	558	31	1084		860
52	380	-56	816		1017
53	1154	-149	2457		1085
54	746	57	1434		982
55	2152	933	3372		1599
56	2695	1013	4377		3677
57	2525	854	4195		4560
58	4017	2353	5680		4694
59	2676	1392	3960		4661
60	7169	4967	9371		4049
61	7122	4835	9408		5219
62	5577	3568	7587		5462
63	5654	3655	7653		7775
64	4395	2806	5984		7673
65	7943	5768	10118		8084
66	7753	5642	9864		8363
67	7635	5629	9640		8646
68	8368	6138	10598		8473
69	8033	5859	10206		9059
TOTAL	86552	79819	93283		96237

While the estimated figures per different age are in “logical” relation with the figures provided by IKA (in most cases, the estimated 95% confidence interval includes the “official” value) the estimated total differs for both men and women. And while, in case of men, ad hoc overestimate the number of pensioners (when compared to IKA figures) in case of women the situation is exactly the opposite (women are underestimated).

In comparing these figures, we should take in to account 2 facts:

IKA data refer to 2003

IKA data include persons that stopped working before they were 50 years old

Some variables of the main LFS questionnaire can help us to estimate the impact of the second difference. If we consider persons who worked for the last time when they were less than 50 years old, and consider themselves in retirement (that is persons with EXISTPR = 1, YEARPR – YEARBIR < 50, and MAINSTAT = 4) we get the results of the next table.

		Do not receive a pension (ad – hoc results)	Reeive a pension (ad – hoc results)	
male	Not in retirement (LFS main status)	244307	0	244307
	In retirement (LFS main status)	31102	166683	197785
	Total	275409	166683	442092
female	Not in retirement (LFS main status)	378346	0	378346
	In retirement (LFS main status)	28444	86551	114995
	Total	406790	86551	493341

We see that the percentage of women that are (probably) in retirement and worked for last time when they were less than 50 years old, is much higher than the corresponding percentage of men (25% to 15%). That difference can explain to a certain degree the underestimation of women pensioners in ad – hoc module.

One other estimated characteristic that was compared with IKA data was the “mean age of retirement” (that is, the age at which the respondent started to receive a pension). These data were available only for the year 2003.

	Figures from IKA (Only for persons that retired during 2003)	
ad - hoc estimation	59,5	61,36
	57,3	58,63

We see that the ad – hoc estimates a lower “retirement” age, both for men and women. The difference in “retirement age” between men and women is rather close: 2.2 year in ad – hoc module and 2.7 years in IKA DATA.

Finally, ad – hoc results for variable 252\_253 (number of years spend working) were compared with SILC results for the similar variable.

#### COMPARISON WITH SILC

	<i>Ad - hoc</i>	<i>SILC</i>
(mean) years of work, men 50 - 69 years old, not in employment	34.9	35,1
(mean) years of work, men 50 - 69 years old,in employment	30.9	34
(mean) years of work, women 50 - 69 years old, not in employment	32.4	24.6
(mean) years of work, women 50 - 69 years old,in employment	27.9	28.0

Ad – hoc and SILC estimates are quite similar in the case of men that are not in employment and in the case of women in employment. We have a considerable difference, in the case of women not in employment (with SILC estimate being higher by 6 years) and in the case of men in employment (with SILC estimate being higher by 3 years). The reason for this systematic difference is not clear but is probably connected with the fact that in ad hoc module only persons that worked for the last time when they were older than 49 years old were asked this question. There is no such limitation to SILC.



## ANNEX

# SURVEY ON THE TRANSITION FROM WORK IN TO RETIREMENT

(AD HOC MODULE OF LFS 2006)  
Personale Questionnaire

CODE: |\_|\_|\_|\_|\_|\_|\_|\_|\_|\_|\_|\_|\_|\_|\_|\_|

Only persons 50 to 69 years old should answer to the questionnaire. **ALL** persons born from **1937** to **1955** are interviewed. Persons that were born in **1936**, **after reference week**, and persons that were born in **1956**, **before reference week**, should be also interviewed

### FILTER 1

#### Is the respondent working?

Yes .....→ Question 96  
No. ....→ FILTER 2

#### 96. Do you receive any pension?

Yes, receives a pension.....☐ 1 → 97  
No does not receives a pension.....☐ 2 → 99

#### 97. Which way you were entitled to receive a pension?

I worked and I got the right to a retirement pension.....☐ 1 → 98  
I get an early retirement pension.....☐ 2 → 98  
I get a widows pension.....☐ 3 → 99  
I get a disability pension.....☐ 4 → 99  
I get an early retirement pension due to disability for work.....☐ 5 → 99  
I get an early retirement pension due to labour market reasons.....☐ 6 → 99  
Did not answer.....☐ 7 → 99

#### 98. At which age did you start to receive your pension?

Age of the respondent at the time he/she start to get a pension..... |\_|\_| → 100

#### 99. Have you establish the right to receive a retirement pension (even partial)?

Yes.....☐ 1 → 100  
No.....☐ 2 → 101

#### 100. Which is your main incentive to stay at work?

To provide sufficient household or personal income.....☐ 1  
To increase retirement pension entitlements.....☐ 2  
Other.....☐ 3

**101. How many years have you been working in your life, in total?**

Number of years the respondent is working ..... | \_ | \_ |

**102. At what age do you plan to stop working?**

Exact age he/she plans to stop working ..... | \_ | \_ |

Do not know exactly but before 60..... ☐ 1

Do not know exactly but between 60 and 64..... ☐ 2

Do not know exactly but 65 or older/or as long as possible..... ☐ 3

Do not know at all..... ☐ 4

Did not answer ..... ☐ 5

**103. Have you reduced your working hours as a first step to retirement?**

Yes..... ☐ 1 → 105

No..... ☐ 2 → 104

Did not answer ..... ☐ 3 → 104

**104. Do you plan to reduce your working hours as a first step to retirement, in the next five years?**

Yes ..... ☐ 1

No ..... ☐ 2

He/She does not now his movements the next 5 years (or they are not related to his/her pension)..... ☐ 3

**105. If you had a more flexible working time arrangement, would you decide to work more years?**

Yes..... ☐ 1      No..... ☐ 2      Do not answer..... ☐ 3

**106. If you had a more opportunities to update your skills or to learn new things, would you decide to work more years?**

Yes..... ☐ 1      No..... ☐ 2      Do not answer..... ☐ 3

**107. If the conditions at your workplace were healthier or safer, would you decide to work more years?**

Yes..... ☐ 1      No..... ☐ 2      Do not answer..... ☐ 3

**Persons that are not working, are not going to answer to the next questions**

**FILTER 2**

**Had the respondent worked in the past?**

YES → FILTER 3

NO → END

**FILTER 3**

**Was the respondent –when worked for the last time – older than 49 years old?**

YES → Question 108

NO → END

**108. How many years did you work in your life?**

*Number of years that respondent worked in total..... | \_ | \_ |*

**109. What was your situation just after you left your last job?**

- Was in normal or early retirement..... ☐ 1 → 110  
In retirement due to disability..... ☐ 2 → 111  
In early retirement due to health problems..... ☐ 3 → 111  
In early retirement due to labour market measures..... ☐ 4 → 111  
Was unemployed..... ☐ 5 → 111  
Disabled (without receiving a pension or other benefit)..... ☐ 6 → 111  
Other..... ☐ 7 → 111

**110. Which was the main reason for retirement or early retirement?**

- Reached compulsory retirement age..... ☐ 1  
He/she established a pension right and preferred to stop working..... ☐ 2  
Lost his/her job..... ☐ 3  
Health problems..... ☐ 4  
Care responsibilities..... ☐ 5  
Problems related to job..... ☐ 6  
Favorable financial arrangements..... ☐ 7  
Other reason..... ☐ 8  
Did not answer..... ☐ 9

**111. Do you receive a pension today?**

- Receives a normal or early pension..... ☐ 1 → 112  
Receives a disability benefit or pension..... ☐ 2 → 113  
Receives an early retirement pension due to health problems..... ☐ 3 → 113  
Receives an early retirement pension due to special labour market measures..... ☐ 4 → 113  
No, he/she is unemployed..... ☐ 5 → 113  
He/she is not able to work (without receiving any pension or benefit)..... ☐ 6 → 113  
Other..... ☐ 7 → 113

**112 . At what age did you start to receive that pension?**

*Age of the respondent when he/she started to receive that pension..... | \_ | \_ | → 114*

**113. Do you have established the right to receive a pension?**

Yes..... ☐ 1      No..... ☐ 2      Do not answer..... ☐ 3

**114. Are you planning to work again?**

- Yes..... ☐ 1 → 116  
No..... ☐ 2 → 115  
Do not answer..... ☐ 3 → 115

**115. Sometimes, people that are working choose to work part time, as a first step to retirement. During the time you were working, did you choose to work part time as a first step to retirement?**

Yes..... ☐ 1 → 118  
No..... ☐ 2 → 118  
Do not answer..... ☐ 3 → 118

**116. At what age do you plan to stop working?**

Exact age the respondent plans to stop working ..... | \_ | \_ | 1  
Do not know exactly, but before 60..... ☐ 2  
Do not know exactly, but between 60 and 64..... ☐ 3  
Do not know exactly but 65 or older/or as long as possible..... ☐ 4  
Do not know at all..... ☐ 5  
DO not answer..... ☐ 6

**117. Do you plan to find a part time job in the next 5 years (to establish a pension right or to increase retirement pension entitlements)?**

Yes..... ☐ 1  
No..... ☐ 2  
He/She does not know his movements the next 5 years (or they are not related to his/her pension)..... ☐ 3

**118. If you had a more flexible working time arrangement, would you decide to continue working more years?**

Yes..... ☐ 1      No..... ☐ 2      Do not answer..... ☐ 3

**119. If you had a more opportunities to update your skills or to learn new things, would you decide to work more years?**

Yes..... ☐ 1      No..... ☐ 2      Do not answer.... ☐ 3

**120. If the conditions at your workplace were healthier or safer, would you decide to work more years?**

Yes..... ☐ 1      No..... ☐ 2      Do not answer.... ☐ 3

**121. Do you receive any of the following benefits or allowances?**

Benefits for remigration..... ☐ 1  
Migrants allowances..... ☐ 2  
EKAS ..... ☐ 3  
Other benefit (for drug users, for persons released from detention, etc)..... ☐ 4  
None..... ☐ 5  
Do not answer..... ☐ 6



# INTERVIEWERS INSTRUCTIONS FOR THE SURVEY ON THE TRANSITION FROM WORK IN TO RETIREMENT

## *Survey's Targets*

Main targets of the ad – hoc module on the transition from work to retirement are:

- To study the way in which the respondents move from labour market to retirement
- To determine the factors that drive the respondents out labour market
- To determine the factors that would help the respondents to postpone their exit from labour market

## *Person covered by the survey*

Survey questionnaire is addressed to persons 50 to 69 years old. That means that we are going to survey all persons that were born from 1937 to 1955, no matter the exact day they were born

We are going also to survey persons that were born in 1936 after the reference week (we consider them as 69 years old at the reference week, and persons that were born in 1956 before the reference week (we consider them as 50 years old at the reference week)

## *Questions description and instruction for their completion*

The questionnaire of the 2006 ad hoc module is personal: for each person surveyed, one different questionnaire should be completed.

In the beginning of the ad hoc module, there is FILTER 1. This is not a question to be addressed to the interviewed person. The purpose of the filter is to help us to follow the correct “flow” of questions, depending on the labour status of the respondent.

So, if the respondent is working, we are going to continue with Question 96. If he/she is not working, we continue with FILTER 2.

## Sort description of the questions that are addressed to people that are working

**Questions 96 – 107 are addressed to persons that are 50 –69 years old and are working. With these questions we are going to collect information on the following subjects:**

- a) If they receive a retirement pension (that is pension, in which they are entitled because they have worked and reached a retirement age). If they do, we are going to ask the age at which they start receiving that pension.
- b) If they don't receive a pension, we are going to ask if they have establish the right to receive such a pension.
- c) If the respondent is receiving a pension (or is entitled to receive) we are going to ask for the reasons that he/she is still working
- d) We are going to ask how many years they work, and the age they plan to stop working.
- e) If they have chosen to work part time (or if they plan to do so), as a first step to retirement
- f) If certain factors would contribute to continue working for more years

### Analytical description of Questions 96 – 107

#### 96. Do you receive any pension?

- Yes, receives a pension..... ☐ 1 → 97  
No does not receives a pension..... ☐ 2 → 99

In Question 96 we are going to ask the respondent if he/she receives a pension-despite the fact he/she is working. If the answer is Yes, we continue with Question 97, if it is No, we continue with Question 99.

#### 97. Which way you were entitled to receive a pension?

- I worked and I got the right to a retirement pension..... ☐ 1 → 98  
I get an early retirement pension..... ☐ 2 → 98  
I get a widows pension..... ☐ 3 → 99  
I get a disability pension..... ☐ 4 → 99  
I get an early retirement pension due to disability for work..... ☐ 5 → 99  
I get an early retirement pension due to labour market reasons..... ☐ 6 → 99  
Did not answer..... ☐ 7 → 99

In Question 97 we are going to ask the respondent how he/she established the right to receive a pension.

The first 2 codes refer to two “classical” forms of pension that are related to work: We are going to use code 1 if the respondent reached the “normal” retirement age while code 2 is used when the respondent receives an early retirement pension.

Codes 3 – 6 are used for other kind of pensions and in particular:

Code 3 is used for widowed pensions.  
Code 4 is used for disability pensions.

Code 5 is used for early retirement pension due to disability  
Code 5 is used for early retirement pension due to labour market measures

Persons that answer with codes 1 or 2 should continue with Question 98 (that is, we are going to ask them when they start to receive that pension. Persons that answer with another code, will continue with Question 99.

**98. At which age did you start to receive your pension?**

*Age of the respondent at the time he/she start to get a pension..... | \_ | \_ | → 100*

In this question we are going to fill in, the age of respondent at the time he/she start to receive a pension.

**99. Have you establish the right to receive a retirement pension (even partial)?**

Yes..... ☐ 1 → 100  
No..... ☐ 2 → 101

With this question we want to learn if the respondent has establish the right to receive a pension. That is, if he has the right (if you would choose to do so) to start receiving a retirement pension. We point out that that question is addressed only to persons that do not receive a “normal” pension and refers only to a pension right that is related with work.

**100. Which is your main incentive to stay at work?**

To provide sufficient household or personal income..... ☐ 1  
To increase retirement pension entitlements..... ☐ 2  
Other..... ☐ 3

This question is addressed to persons that either receive a pension or they have established the right to receive a pension. We are interested in their main motive: If it is the provision of sufficient household or personal income (code 1), or if is the increase in pension entitlements (code 2), or if it is another motive (code 3). When the respondent cannot choose among the different motives, the first code that applies should be used.

**101. How many years have you been working in your life, in total?**

*Number of years the respondent is working..... | \_ | \_ |*

In this question, the total number of years that the respondent has been working in his/her life should be filled in. We must be careful, so that the answer in this question not to be in “conflict” with the age of the respondent and the year that start working for his employer (or as self-employed). For example, if the respondent is 52 years old, the answer in Q.101 cannot be 48. Or, if he started working in his present job, in 1980 (that is, before 26 years) the answer in Q101 cannot be 22.

Time that the respondent was absent from job, because of maternity leave, illness or accident, should be included in total years of work.  
If the respondent cannot remember exactly the number of years, we can accept an approximation.

Trivial jobs (for example, during studies) should not be counted.

**102. At what age do you plan to stop working?**

- Exact age he/she plans to stop working .....|\_|\_|
- Do not know exactly but before 60.....☐ 1
- Do not know exactly but between 60 and 64.....☐ 2
- Do not know exactly but 65 or older/or as long as possible.....☐ 3
- Do not know at all.....☐ 4
- Did not answer .....☐ 5

With Question 102 we want to learn at what age the respondent plans to stop working. If the respondent knows exactly that age, we are going to write the exact age at the first line. If the respondent can only tell that this age is before 60 or between 60 and 64, or after 65, we will check one of the codes 1, 2 or 3, respectively. Code 4 is for cases, when the respondent cannot determine the age he/she plans to stop working.

**103. Have you reduced your working hours as a first step to retirement?**

- Yes.....☐ 1 → 105
- No.....☐ 2 → 104
- Did not answer .....☐ 3 → 104

**In this question the respondent is going to answer if he had choose to work less hours, as a first step towards retirement. We point out that, if the respondent is working part time, because he/she cannot find a full time job, his/her answer must be NO. If the answer is YES we continue with question 105, but if it is NO, we continue with Question 104.**

**104. Do you plan to reduce your working hours as a first step to retirement, in the next five years?**

- Yes .....☐ 1
- No .....☐ 2
- He/She does not now his movements the next 5 years (or they are not related to his/her pension).....☐ 3

Question 104 is similar to Question 103. The difference is that refers to respondent's plans for the next five years.

Next 3 questions are similar. With each one of them we want to know if certain factors would contribute in respondent's staying longer in labour market (to work more years).

We must note that the answer should be yes, even if the factor would contribute only to some degree.

**105. If you had a more flexible working time arrangement, would you decide to work more years?**

- Yes.....☐ 1      No.....☐ 2      Do not answer.....☐ 3

Part time working and working at home, are included in flexible working time arrangement.

**106. If you had a more opportunities to update your skills or to learn new things, would you decide to work more years?**

Yes.....☐ 1      No.....☐ 2    Do not answer.....☐ 3

**107. If the conditions at your workplace were healthier or safer, would you decide to work more years?**

Yes.....☐ 1      No.....☐ 2    Do not answer.....☐ 3

Question 107 is the final question we address to persons that had a job during reference week. **These persons do not answer to the next questions.**

Next questions (Question 108 to Question 121) are addressed to persons age 50 to 69 years old, **under certain preconditions.**

These preconditions are:

- a) The respondent must have worked in the past (to have answer with code 1, in Question 49 of the main questionnaire

**AND**

- b) The time he/she worked for the last time, he/she was 50 years old, at least

The year when the respondent worked for the last time is recorded in Question 50 of the main questionnaire. Year of birth is recorded at col. 8.

So, a person who worked in the past will answer Questions 108 – 121 when: YEAR OF LAST JOB – YEAR OF BIRTH > 49

#### Analytical description of Questions 108 – 121

**108. How many years did you work in your life?**

*Number of years that respondent worked in total.....|\_|\_|*

In this question, the total number of years that the respondent has been working in his/her life should be filled in. We must be careful, so that the answer in this question not to be in “conflict” with the age of the respondent and the year he worked for the last time. For example, if the respondent is 52 years old, the answer in Q.108 cannot be 48. Or, if he stopped working when he was 50 years old, the answer in Q108 cannot be 45.

Time that the respondent was absent from job, because of maternity leave, illness or accident, should be included in total years of work.

If the respondent cannot remember exactly the number of years, we can accept an approximation.

Trivial jobs (for example, during studies) should not be counted.

### 109. What was your situation just after you left your last job?

- Was in normal or early retirement..... ☐ 1 → 110
- In retirement due to disability..... ☐ 2 → 111
- In early retirement due to health problems..... ☐ 3 → 111
- In early retirement due to labour market measures..... ☐ 4 → 111
- Was unemployed..... ☐ 5 → 111
- Disabled (without receiving a pension or other benefit)..... ☐ 6 → 111
- Other..... ☐ 7 → 111

Question 109 refers to respondent' s situation, at the time he stopped working (that is the year he/she reported at Question 50).

As it is obvious, that situation may be different from the present situation of the respondent: for example, the year she stopped working, she was searching for a job, but now she is inactive.

Depending on respondent's answer, we are going to check on of the codes 1 – 7. We must note that code 1 is used when the respondent went in to retirement, normal or early, when this retirement is related to work (that is, when he established the right to that pension because he was working).

Persons that answer with code 1, continue with Question 110, while persons who answer with another code, continue with Question 111.

### 110. Which was the main reason for retirement or early retirement?

- Reached compulsory retirement age..... ☐ 1
- He/she established a pension right and preferred to stop working..... ☐ 2
- Lost his/her job..... ☐ 3
- Health problems..... ☐ 4
- Care responsibilities..... ☐ 5
- Problems related to job..... ☐ 6
- Favorable financial arrangements..... ☐ 7
- Other reason..... ☐ 8
- Did not answer..... ☐ 9

With Question 110 we want to learn the main reason respondent decided to go into retirement.

Code 1 is going to be used when the respondent could not (due to legislation) continue to work any more.

In order to use any of the other codes, (code 2 – code 8) we note that the respondent should a) have establish the right to receive a pension, b) had the right to continue to work and c) decided to stop working for some other reason.

### 111. Do you receive a pension today?

- Receives a normal or early pension..... ☐ 1 → 112
- Receives a disability benefit or pension..... ☐ 2 → 113
- Receives an early retirement pension due to health problems..... ☐ 3 → 113
- Receives an early retirement pension due to special labour market measures..... ☐ 4 → 113
- No, he/she is unemployed..... ☐ 5 → 113
- He/she is not able to work (without receiving any pension or benefit)..... ☐ 6 → 113
- Other..... ☐ 7 → 113

Question 111 is similar to Question 109, but refers to the present situation of the respondent. If the respondent receives a normal or early pension continues with Question 112. In any other case, continues with Question 113.

**112 . At what age did you start to receive that pension?**

Age of the respondent when he/she started to receive that pension..... | \_ | \_ | → 114

In this question we are going to write the age of respondent when he/she started to receive a pension for the **first time**. Persons who answer to that question continue with Question 114.

**113. Do you have established the right to receive a pension?**

Yes..... ☐ 1      No..... ☐ 2      Do not answer..... ☐ 3

With this question we want to learn if the respondent has establish the right to receive a pension. We note that this question is addressed to people that may receive another kind of pension (for example, as widowed, etc) and refers only to a right to receive a pension, based **only** to work.

**114. Are you planning to work again?**

Yes..... ☐ 1 → 116  
No..... ☐ 2 → 115  
Do not answer..... ☐ 3 → 115

This is a simple question, which is addressed to all person, even if they receive a pension. People that are planning to work again continue with Question 116, where people who are not planning to work again continue with question 115.

**115. Sometimes, people that are working choose to work part time, as a first step to retirement. During the time you were working, did you choose to work part time as a first step to retirement?**

Yes..... ☐ 1 → 118  
No..... ☐ 2 → 118  
Do not answer..... ☐ 3 → 118

**Question 115 is addressed to people that are not going to work again. We are going to ask if they worked part time, as a first step to retirement. That means, that people who worked as part timers because they could not find a full time job must answer NO (code 2) in this question.**

Persons who answer to that question continue with Question 118.

**116. At what age do you plan to stop working?**

Exact age the respondent plans to stop working ..... | \_ | \_ | 1  
Do not know exactly, but before 60..... ☐ 2  
Do not know exactly, but between 60 and 64..... ☐ 3  
Do not know exactly but 65 or older/or as long as possible..... ☐ 4  
Do not know at all..... ☐ 5  
DO not answer..... ☐ 6

With this question we want to learn at what age the respondent plans to stop working. If the respondent knows exactly that age, we are going to write the exact age at the first line. If the respondent can only tell that this age is before 60 or between 60 and 64, or after 65, we will check one of the codes 1, 2 or 3, respectively. Code 4 is for cases, when the respondent cannot determine the age he/she plans to stop working.

**117. Do you plan to find a part time job in the next 5 years (to establish a pension right or to increase retirement pension entitlements)?**

- Yes..... ☐ 1  
 No..... ☐ 2  
 He/She does not know his movements the next 5 years (or they are not related to his/her pension)..... ☐ 3

**Question 117 is addressed to persons that plan to work again. We are going to ask them if the plan to find a part time job, as a step to establish a pension right or to have a better pension.**

**Next 3 question are similar, and are addressed to all persons, no matter if they plan to work again or no. With these questions we want to learn if certain factors would contribute in respondent's staying longer in labour market (to work more years).**

We must note that the answer should be yes, even if the factor would contribute only to some degree.

**118. If you had a more flexible working time arrangement, would you decide to continue working more years?**

- Yes..... ☐ 1      No..... ☐ 2      Do not answer..... ☐ 3

Part time working and working at home, are included in flexible working time arrangement.

**119. If you had a more opportunities to update your skills or to learn new things, would you decide to work more years?**

- Yes..... ☐ 1      No..... ☐ 2      Do not answer.... ☐ 3

**120. If the conditions at your workplace were healthier or safer, would you decide to work more years?**

- Yes..... ☐ 1      No..... ☐ 2      Do not answer.... ☐ 3

**121. Do you receive any of the following benefits or allowances?**

- Benefits for remigration..... ☐ 1  
 Migrants allowances..... ☐ 2  
 EKAS ..... ☐ 3  
 Other benefit (for drug users, for persons released from detention, etc)..... ☐ 4  
 None..... ☐ 5  
 Do not answer..... ☐ 6

Question 121 is addressed to all persons. We want to know if the respondent receives any special benefit or allowance that is not included in pensions (retirement, disability, or widowed pensions).