

List of Indicators

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Preamble

Under the provisions of the Memorandum of Understanding between the UNECE and the Government of Austria, the European Centre for Social Welfare Policy and Research is setting up indicators of achievement, developing and collecting data on these indicators related to the commitments in the Regional Implementation Strategy (RIS) of the Madrid International Plan of Action on Ageing (MIPAA). This work is the key activity in the MA:IMI project, which aims at assisting national governments and focal points in monitoring RIS.

The outline of the list presented here was agreed upon at the workshop *Sustainable Ageing Societies: Indicators for Effective Policy-Making*, organised jointly by the European Centre, UNECE and the Spanish Institute for Older Persons and Social Services in April 2004 in Madrid. The indicators were finalised in an expert meeting held at the European Centre in Vienna in February 2006. In between those meetings, a wide range of experts provided comments and suggestions. We gratefully acknowledge their contribution¹.

The presented indicators cover four main topics: demography, income and wealth, labour market participation, and social protection and financial sustainability. As far as possible, the indicators are gendered, compare old age with other age categories, and distinguish very old people. The list includes core indicators, collection of which we envisage as most important. Resources and data availability permitting, they can be supplemented by additional indicators, classified into those of primary and secondary importance. We visualize the core and primary indicators in charts and provide additional information in a technical appendix.

In data collection, we plan to utilize as much as possible the existing international sources, such as the databases of the UN, UNECE, Eurostat and European Commission reports, OECD, and ILO. Data collected from these sources will be presented for review to the national focal points on ageing who could update and provide additional comments as necessary. We also look forward to working together with the national focal points in obtaining data from national sources on indicators not covered in international sources. The data will be visualised in tailored-made charts, and published in booklets addressing the different topics. Core data would also be made available on the Monitoring RIS web page.

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I. Demographic indicators

Suggested Indicators						
Group		Definition		Sources / Availability	Type ²	Notes
DEM01	Basic Dimensions and Population Ageing	DEM01a	Population Size	<i>UN World Population Prospects: the 2004 Revision</i>	Core	1950-2050 (at least in five-years intervals)
		DEM01b	Population by Five-Year Age and Sex (%)	<i>UN World Population Prospects: the 2004 Revision; Eurostat (2006)</i>	Core	Population pyramid; plotted together with median age for same year
		DEM01c	Median Age of the Population	<i>UN World Population Prospects: the 2004 Revision</i>	I	Time trend: 1950 – 2050
		DEM01d	Median Age standardized for Life Expectancy (“Prospective Age”)	<i>WHO, UN World Population Prospects, OECD. Methodology: see Sanderson & Scherbov2005</i>	I	2000 as the index year; plotted on the same chart as DEM01c
		DEM01e	Population Changes: Natural Growth, Overall Growth	<i>UN World Population Prospects: the 2004 Revision</i>	Core	
		DEM01f	Population by Aggregate Age Groups: 0-14, 15-64, 65+	<i>UN World Population Prospects: the 2004 Revision</i>	Core	1950-2050, in five-years intervals
		DEM01g	Demographic Dependency Ratios: 0-14/15-64; 65+/15-64; ((0-14)+(65+))/15-64	<i>Derived from DEM01f</i>	Core	1950-2050, in five-years intervals
		DEM01h	Ageing of the Aged: Share of the Very Old (80+) in the Total Elder Population (65+)	<i>UN World Population Prospects: the 2004 Revision</i>	Core	1950, 2000, 2050
		DEM01i	Percentage of the Population Living in Single-Person Households, % Living in Institutional Households, by Sex and Age-Group: 0-14, 15-64, 65-79, 80+	<i>Community Programme of Population and Housing Censuses in 2001</i> by Eurostat. Data for EU countries to be requested from Eurostat. In non-EU countries, available from a standard census publication	I	Footnote: is institutional population distinguished or not?

² I: Primary; II: Secondary.



Around the 3 determining factors:						
DEM02	Longevity	DEM02a	Life Expectancy at Ages 0, 1, 20, 65, 80 (and at the legal retirement age, if that is different from 65), by sex	<i>Eurostat 2006, UN Life Tables (UN World Prospects)</i>	Core	Presentation needs to be footnoted: "Life Expectancy is a measure of mortality in the given calendar year"
		DEM02b	Survival Rates at ages 20, 60, 65, 80	<i>UN Life Tables (UN World Prospects)</i>	I	1950-2005
		DEM02c	Pension duration of people retiring today & duration extension over time (<i>cohort indicator</i>)	<i>Residual LE : UN Life Tables ; Effective Retirement Age : Scherer, OECD 2006</i>	Core	Operationalisation needs: residual LE at effective retirement age
DEM03	Fertility	DEM03a	Total Fertility Rate	<i>UN World Population Prospects 1950-2002, (also using NewCronos)</i>	Core	1950-2000 (or 2005), in five-year intervals
		DEM03b	Net Reproduction Rate	<i>UN World Population Prospects 1950-2002</i>	I	1950-2000 (or 2005), in five-year intervals
DEM04	Migration	DEM04a	Net Migration	<i>Information implicit in DEM01e</i>		Obtained by subtracting natural growth from overall population growth
Useful supplementary indicators:						
DEM05	Health Indicator	DEM05a	Health-adjusted life expectancy (HALE), disability-free life expectancy (DFLE), by sex <i>Alternatives measures of disability trends will be considered under the Care Topic later on</i>	<i>Eurostat // Euro-REVES, WHO</i>	I	Presentation needs to be footnoted with a warning on data quality, availability and comparability [which years?]. Another footnote: are institutionalised persons in or out of the sample?
DEM06	On Disruption in Cohort Flows	DEM06a	Flags for "demographic shocks"	<i>National Sources</i>	II	Only graphical representation?



II. Income and wealth

Suggested Indicators ³						
Group		Definition		Source / Availability	Type	Notes
IW01	Income status	IW01a	Average disposable income ⁴ (in PPPs, for different age groups, e.g. 25-54, 55-64; 65-74; +75)	ECHP, EUROSTAT Newcronos database (EU15), LIS (for more New Member countries); EU-SILC ⁵	Core	
		IW01b	Relative disposable income (total population = 100)		Core	
IW02	Income Distribution and Composition	IW02a	S80/S20 ratio of disposable income, by age group			I
		IW02b	Income composition, by income groups (quintiles): income from work, private income, old-age benefits, other benefits.	ECHP, EUROSTAT Newcronos database (EU15) ; EU-SILC	Core	
IW03	Poverty	IW03a	Relative income poverty rate, at 60% median threshold, by age group	ECHP, EUROSTAT Newcronos database (EU25), LIS (for non-EU25) ; EU-SILC	Core	
		IW03b	Median income poverty gap at 60% median threshold		I	
		IW03c	Persistent income poverty rate (3 years poor out of 4), at 60% median threshold		I	
		IW03d	Non-monetary deprivation rates, national definitions		II	
IW04	Minimum Income Protection for Older Persons	IW04a	Institutional features of minimum income guarantee for older people (e.g. social pensions)	MISSOC (EU25,Bulgaria, Romania) + National sources	Core - Instrumental	Short info + technical appendix
		IW04b	Amount of the minimum income protection level as % of 1) the average pension, 2) the minimum wage (or equivalent), 3) the poverty line (60% of national median)		I	
		IW04c	Share of older persons relying, fully or partly, on minimum income protection schemes and other old-age related benefits as % of the population above 65 (or different thresholds);	National sources (National Action Plans), Social Protection Committee (data available end of 2006)	I	

³ The following list of indicators implicitly assumes breakdowns by gender and comparisons between different age groups: 65-74 (+75, and when possible +85) vs. 55-64 and vs. the prime age population (25-54), subject to data availability.

⁴ We refer from now onwards to disposable household income equivalised using the OECD modified equivalence scale.

⁵ ECHP data are available until 2001; the survey has been replaced by EU-SILC which will cover all 25 New Member States. The EUROSTAT database reports EU-SILC data for the old EU 15 Member States from 2003-2004 (survey years), but data are not available yet for the New Member States. For the period between 2001 and 2003, EUROSTAT data refer to national surveys.



		IW04d	Per capita expenditure on minimum income protection schemes *) Presentation needs to be footnoted with a caveat: "institutional differences in the design of the benefits might make cross-country comparisons problematic"	OECD countries + National sources; EUROMOD and I-CUE feasibility studies; ESSPROSS	I	*)
IW05	Wealth	IW05a	Composition of wealth holdings by components (e.g. housing; financial assets);	LWS, National Sources SHARE	I	
		IW05b	Distribution of total wealth by age groups;	ECHP (EU15) LIS for New Member Countries LWS (not available yet) National Sources; SHARE	II	
		IW05c	Average Individual (Pension) Wealth at Retirement Age	Central Banks, National Sources	I	
IW06	Income and Wealth Mobility	IW06a	Development of income of pensioners (broken down by private sources vs. public transfers) over their retirement period;	ECHP, GSOEP for a limited number of countries (1984-2001) – EU15 only	II	
IW07	Pension Indicator	IW07a	Net replacement rates (e.g. age group 65-74 vs. 55-64)	OECD, European Commission	Core	Footnote: empirical, not stylised replacement rates



III. Labour Market and Labour Market Participation

Commitment 5: "To Enable Labour Markets to Respond to the Economic and Social Consequences of Population Ageing"

According to Commitment 5, four main policy objectives should be met, through related specific measures. Between brackets are listed the indicators proposed to monitor these measures and objectives:

- 1. Seek a significant reduction in rates of unemployment, especially for older persons (LM03)**
Measures to promote access to employment opportunities and reduce unemployment rates, especially for older persons, are necessary
 - To implement active labour market policies (LM03a)
such as job matching, job-search assistance, training, vocational guidance, counselling, and so on
 - Efforts aimed at shaping educational curricula to respond to labour market needs and at easing the transition between formal education and work can help promote employment (LM03b)
 - Measures to reduce non-wage labour costs while protecting workers' rights (LM03c)
 - Other factors weakening the demand for labour, such as barriers to new business start-ups and regulations imposing heavy administrative costs on employers should be carefully scrutinised and, where possible, eased (LM03d)
- 2. Improve the employability of older workers (LM04)**
 - Through vocational guidance and vocational training, based on life-long learning (LM04a)
Employers should be encouraged to enable their employees to retrain and reskill through life-long learning
 - Other measures should focus on improving working conditions (LM04b)
- 3. Raise participation rates for all women and men (LM01)**
 - Improve care facilities and introduce arrangements, which make it easier for all workers, women and men, to combine work and family responsibilities (LM01d)
 - Remove barriers and disincentives to work longer, including the incentives that encourage early retirement (LM01a, LM01b, LM01c)
 - Promote the rehabilitation of workers with disabilities and their re-integration in the labour force (LM01e)
 - Promote better training of older workers, and take measures against age discrimination (LM01f, LM01g)
 - Review financial and other disincentives to the participation of retired persons in part-time or temporary employment (LM01h)
 - Increase through economic policy and incentives employment opportunities for persons living in rural and remote areas, in particular encouraging their distance learning and training (LM01i)
- 4. Take steps to raise the average effective age at which people stop working and make retirement more flexible and gradual (LM02)**
Labour market structures and economic policies should be promoted together with social protection systems that offer incentives for the participation of older workers, so that workers are not encouraged to take up early retirement and are not penalised for staying in the labour market as long as they wish and that pension systems and working arrangements facilitate the option of gradual retirement. In the case of those who opt to retire, every effort should be made to promote a smooth and gradual transition from one type of life to another.

Additional discussions / suggestions mentioned in Commitment 5:

- Particular emphasis should be made on incentives for engaging older persons in SMEs (LM01j)
- To increase the awareness of the benefits of including older persons in the workforce and eliminating age barriers and discrimination in recruitment and employment of older workers (LM01f, LM01g, LM06)
- Concerted measures are needed to increase labour force participation of women (**rationale for generalised gender breakdown**).

These measures should aim to

- further broaden their job opportunities,
- better reconcile the professional and family responsibilities (see also future Care indicators)
- and avoid discriminatory situations with regard to pension benefits or personal income experienced by many women. (see also SUS11)

Important ways to achieve this are suitable education and training, including on-the-job training, job counselling and allowing for flexible work arrangements.

- Special needs of ageing migrants should be taken into consideration (LM05), as appropriate, and consistent with national laws in the design and implementation of integration programmes to facilitate their participation in the social, cultural and economic life of countries of destination.



Group	Subgroup	Definition	Source/ Availability	Type	Notes	
LM01	Participation Rates	LM01a	i) Labour force participation rates of workers aged 55-64 compared with total population and other reference age groups (prime age: 25-54)	EUROSTAT, OECD, ILO	Core	1980-2004
			ii) Employment rates for workers aged 55-64 compared with total population and other reference age groups (prime age: 25-54)		Core	1980-2004
			iii) Share of workers aged 55-64 in the total labour force (and in the employed population) and its growth rate(e.g. comparing decades)		I	1980-2004
			iv) Median Age of the Labour Force, compared to the median age of the population		ECHP	I
		LM01b	Unemployment and inactivity rates by age groups: 55-64 in comparison to the total population and other reference age groups (prime age: 25-45 or 25-54)	EUROSTAT, OECD, ILO	Core	
		LM01c	Long-term unemployment rates for people aged 55-64 in comparison to the total unemployed population		I	1985-2005
		LM01d	Time spent in paid vs. unpaid work activities (e.g. volunteering vs. household production) by age groups *) This policy measure will also be addressed at a later stage (see Care indicators)	ECHP (EU15) LIS OECD (Willem Adema), Babies and Bosses, Time use survey (Society at a Glance)	I	2001 (or latest year available)
		LM01e	i) Disability rates by age groups	EUROSTAT, ECHP, OECD	II	
			ii) Outflow rates from disability benefit recipient status to work, by age groups		II	
			iii) Share of non-employed disability benefit recipients at ages younger than the statutory retirement age and above age 50, as % of the population aged between 40 and 65 years, and as % of the retired population aged between 40 and 65 years	ECHP (EU15), OECD (see Scherer)	I	
		LM01f	Earnings comparison between age groups (by education)	EUROSTAT, ECHP, OECD (Live Longer, Work Longer)	II	
		LM01g	i) Existence of mandatory retirement age	National sources, OECD (Working conditions)	Core	Instrumental, same chart as LM02h
			ii) Existence of age limits to the application of dismissal laws			
			iii) Existence of age-related reasons to force people out of work			
			iv) Existence of protection laws against forced retirement			
LM01h	Part time employment rates for mature-aged workers (55-64) compared to part time rates in the total population or in other population subgroups (prime age, e.g. 25-45 or 25-54)	OECD	II			
LM01i	Employment and labour force participation rates of mature-aged workers (55-64) by regional breakdown and urban vs. rural areas distinctions	ECHP / Newcronos (EU15)	II			
LM01j	Share of mature-aged workers (aged 55-64) on the total workforce at the firm level by firm size	ECHP, ILO	II			



Group		Subgroup	Definition	Source/ Availability	Type	Notes
LM02	Average Effective Retirement Age and Flexible Retirement	LM02a	i) Average effective labour market exit age *) Presentation needs to be footnoted with a caveat: “difficulties might arise when computing the retirement status variables from microdata using self-defined status”	<i>EUROSTAT, complemented if necessary with ECHP (EU15), OECD (see Scherer)</i>	Core	same chart as LM02b and LM02c + *)
			ii) Alternative: expected time spent in employment	<i>See Hytti & Nio (2004)</i>		Not enough data available yet
		LM02b	Effective retirement age for 25% and 75% of the labour force	<i>See LM02a</i>	Core	same chart as LM02a and LM02c
		LM02c	“Early Exit”: difference between the average effective retirement age and the statutory retirement age	<i>See LM02a</i>	Core	same chart as LM02a and LM02b
		LM02d	“Early / Late Retirement”: people retiring in a certain year: % before and after 65 (or % before and after legal retirement age)	<i>National administrative sources</i>	I	
		LM02e	Average age of entry into employment (age of getting the 1 st job)	<i>EUROSTAT, complemented if necessary with ECHP (EU15), OECD (see Scherer)</i>	I	
		LM02f	Lifetime allocation of work and non-work (one point in time)	<i>OECD</i>	I	
		LM02g	Implicit tax on work (accrual of benefits if retirement is delayed after the first eligibility age)	<i>OECD (Ed. Whitehouse), National sources</i>	I	
		LM02h	<u>Instrumental</u> i) Existence of flexible retirement corridors at the national level; ii) Spread (or “generosity”) of the retirement corridor. Operationalisation: youngest, statutory and oldest eligibility age for old-age benefits take up, by gender, under the current system (or “currently”) and the fully operational system after eventual reforms	<i>National sources, OECD Pensions at a glance</i>	Core	Instrumental, same chart as LM01g



Group		Subgroup	Definition	Source/ Availability	Type	Notes
LM03	Unemployment Reduction	LM03a	Participants in ALMP (<i>Active Labour Market</i>) programs targeted to workers aged 55+	EUROSTAT → National sources	II	
		LM03b	Employment rates and labour force participation rates of workers aged 55-64 by educational attainment	EUROSTAT, ILO, OECD (<i>Education at a glance</i>)	II	
		LM03c	Non-wage Labour Costs as a % of Wages over time	Carone et al.	II	
		LM03d	Indicators of employment protection legislation (inverse), possible tax schemes	OECD database on employment protection legislation + ILO's Social Security Inquiry	II	
LM04	Employability of Older Workers	LM04a	Share of workers aged 55-64 involved in (re)training activities as % of both the population aged 55-64 and of the labour force aged 55-64	ECHP, SHARE	II	
		LM04b	Days of sickness or absence for workers aged 55-64 vs. other reference groups (e.g. 25-54)		II	
LM05	Ageing Migrants	LM05a	Employment and labour force participation rates of native born vs. foreign born: both in working age and after 65	OECD, ECHP	II	
		LM05b	Actual retirement age of foreign born vs. native born		II	
		LM05c	Existence of residence rights for foreign born after retirement		II	
		LM05d	Average wage for foreign born vs. native born, overall and at retirement age		II	
LM06	Eliminating Age Barriers and Discrimination in Recruitment and Employment of Older Workers	LM06a	Existence of national public campaign or awareness campaign for anti-discrimination of older workers	National sources	II	
		LM06b	Related expenditures		II	
		LM06c	Existence of any assessment measure of the effectiveness of the campaign		II	



IV. Social Protection and Financial Sustainability

Commitment 4: “To Adjust Social Protection Systems in Response to Demographic Changes and their Social and Economic Consequences”

According to Commitment 4, four main policy objectives should be met, through related specific measures. Between brackets are listed the indicators proposed to monitor these measures and objectives:

1. **Preserve and strengthen the basic objectives of social protection, namely to prevent poverty and provide adequate benefit levels for all** (SUS01, SUS02, SUS08)
 - Extension of social protection systems to all sections of the population, from the very young to the very old
 - To support social inclusion through participation in the labour force for the young and those of working age: (SUS08, SUS09, see also LM indicators)
 - To provide a standard of living for persons who are not able to work due to disability and for persons beyond working age, that allows them to maintain their self-respect and dignity (SUS01a, SUS01b, SUS02)
 - In particular, to achieve a sufficient income for all older persons (SUS01, SUS02)
2. **Establish or develop a regulatory framework for occupational and private pension provision** (SUS10)
3. **Adapt existing social protection systems to demographic changes and changes in family structures** (SUS03, SUS04, SUS05, SUS06, SUS07, SUS08, SUS09)

Policies should address the needs of older persons for a variety of social and health services, including sheltered housing and long-term care (SUS05h see also future Care indicators)

4. **Pay special attention to the social protection of women and men throughout their life course** (SUS11)
 - Equal treatment of men and women in social protection systems (SUS11a, SUS11b)
 - Support a better reconciliation of work and family responsibilities throughout the life cycle (SUS11d, see also future Care indicators)

Special attention needs to be paid to the position of those family members who interrupt their employment to rear children or to care for family members and as a result suffer reduction in their pension entitlement (SUS11c) and those who devote themselves to household work and the care of children and other relatives. Both groups often face a precarious financial situation in old age.

Policies to alleviate these problems could include (see also future Care indicators)

- Special leave arrangements for working parents and other caregivers, (SUS11d)
- Other supportive measures such as respite care services.

Additional discussions / suggestions mentioned in Commitment 4:

- Social protection systems:
 - Can also contribute to adequate income maintenance (SUS01)
 - Reflect broader political and social values of social justice and cohesion, which place limits on the degrees of inequality or social deprivation a society is willing to tolerate (SUS02)
- Social security faces many challenges in adapting (SUS04c, SUS04d, SUS08)
 - to changes in family structure,
 - to the emergence of more unstable work patterns
 - to changes in the age profile of populations and globalisation
- Systems -- or combinations of them -- are needed that strengthen incentives to participate in the labour force (SUS07, SUS08, SUS09, see also LM indicators) while ensuring protection for the weakest groups in society (SUS02)
- Steps should be taken to ensure financial sustainability of social protection systems in the face of demographic ageing (SUS04, SUS05, SUS06, SUS07, SUS08)
- The various types of benefit system -- social insurance (financed from but not directly related to contributions) (SUS03), universal benefits, means-tested benefits -- have different implications for the behaviour of both recipients and their employers.



Group	Subgroup	Suggested Indicators	Sources / Availability	Type	Notes	
SUS01	Adequate Income Maintenance	SUS01a	Stylised (individual) replacement rates, current and prospective (system indicator, not empirical RRs)	<i>European Commission 2006, SPC 2004, NSR 2005</i>	Core	
		SUS01b	Stylised (individual) overall replacement ratio, for early retirees	<i>Casey et al. 2003, 84ff</i>	I	
		SUS01c	Aggregate replacement ratios (average monthly pensions of retirees aged 65-74 as a percentage of average monthly earnings of employed aged 50-59; if available also for retirees and employed as a whole)	<i>European Commission 2006; HV österr. SV; NSR 2005</i>	I	
			<i>Alternative: Median income ratio between persons aged 65 years or more and persons aged 55-64 years, by gender (if relevant then subgroups, e.g. workers)</i>	<i>Eurostat: EU-15 1995-2001; NSR 2005</i>	I	See IW07b
		SUS01d	Pension Wealth: present value of the future stream of (net of tax) pension payments to which a person is entitled over his/her life in retirement (multiple of economy-wide average earnings)	<i>OECD 2005</i>	Core	
		SUS01e	Required contribution period in order to get the minimum (guaranteed) pension (in earnings-related old-age pension system) for a median or low income person	<i>Rürup 2004; OECD/Ed Whitehouse</i>	I	
SUS02	Social Justice and Inequality	SUS02a	Generosity towards the poor: replacement ratio of the bottom quintile divided by the replacement ratio of the top quintile	<i>Soziale Sicherheit 2/2003: AUT 2001</i>	II	
		SUS02b	Stylised (individual) replacement rates by different earnings levels (100% and 2/3 of average income)	<i>SPC 2004, NSR 2005</i>	Core	Should be next to SUS01a
		SUS02c	Ratio minimum pension/average pension	<i>NSR 2005</i>	I	See IW04b
		SUS02d	Ratio S80/S20 by gender and age	<i>Eurostat, NSR 2005</i>	I	See IW02a
		SUS02e	Social exclusion: coverage of older persons (% benefiting from minimum pension schemes)		I	See IW04c
		SUS02f	Intergenerational fairness: overall liability of the State with respect to future generations	<i>No data (operationalisation: still open)</i>	II	
SUS03	Relationship between Contributions and Benefits	SUS03a	Necessary contribution level / alt. necessary pensions adjustment ("implicit contribution rate") to balance pensions expenditure (where it applies) vs. effective contribution rate	<i>NSR 2005; OECD 2005; EPC 2005; European Commission 2003b</i>	I	
		SUS03b	Implicit / notional rate of return on social security-pension contributions ("Benefit-cost ratios")	<i>OECD/ Ed Whitehouse</i>	II	



SUS04	Public and Total Pension Spending ⁶	SUS04a	i) Public pension spending projected for a defined period of time (2004-2050) as % of GDP ii) Total pension spending...	<i>EPC 2006, EPC 2003, NSR 2005, Eurostat, GVG 2002, Holzmann 2003</i>	Core	Same chart as SUS04b
		SUS04b	i) Public pension spending in % of all social expenditures ⁷ ii) Total pension spending...	<i>ESSPROSS; EPC 2006, EPC 2003, NSR 2005, Eurostat, GVG 2002, Holzmann 2003</i>	Core	Same chart as SUS04a
		SUS04c	i) Decomposition of projected public pension spending increase by changes in: dependency; employment; take-up; relative benefit level	<i>NSR 2005, Casey et al. 2003; EPC 2006</i>	I	
			ii) Decomposition of projected total pension spending increase ... (if available)			
		SUS04d	i) Sensitivity test for public pension spending projections: increased employment, increased employment of older workers, higher life expectancy	<i>EPC 2003, EPC 2001, EPC 2006</i>	II	
			ii) Sensitivity test for total pension spending projections ...			
		SUS04e	i) Public pension spending covered by contributions (operationalisation: yearly contribution revenue as a % of pension expenditure)	<i>NSR 2005; EPC 2006</i>	I	
			ii) Total pension spending ... (if available)			
SUS04f	i) (Accumulated) assets in public pension schemes	<i>EC 2003; NSR 2005; EPC 2006</i>	II			
	ii) (Accumulated) assets in all pension schemes					
SUS05	Age-related Public Expenditure	SUS05a	i) Age-related public expenditure (pensions, health and long-term care) in % of GDP	<i>EPC 2003, 33f; EPC 2006</i>	I	
		SUS05b	Projected expenditure in % of GDP:		II	
			i) health care	<i>EPC 2003, GVG 2002, OECD 2006; EPC 2006</i>	II	
			ii) long-term care	<i>EPC 2003, GVG 2002, OECD 2006; EPC 2006</i>	II	
SUS06	Sustainability of Public Finances	SUS06a	Sustainability gap indicators: S1, S2 (former tax gap indicators: T2, T3)	<i>EPC 2003, Salomäki 2006</i>	I	
		SUS06b	Projections for public debt evolution	<i>No data so far; EC, EPC to come</i>	II	
SUS07	(Dis-) incentives for Early Retirement	SUS07a	Replacement ratio for early retirees	<i>See above - SUS01b</i>		
		SUS07b	Exploring the incentive to retire			
			i) Accrual: change in social security wealth by postponing retirement for 1 year	<i>Casey et al. 2003</i>	I	

⁶ The definitions for public spending will follow the distinctions made by the EPC, this concerns especially the question whether expenditures for mandatory private funded 2nd tiers of the pension systems are included or not. Data for total pension spending will be provided as far as it is available.

⁷ Also takes into account possible decreasing expenditures in other areas, e.g. education, unemployment (projected expenditures education, unemployment in % GDP see EPC 2003, 29f).



			ii) Tax rate: the accrual divided by the (potential) gross earnings, during the year of postponement	<i>i) + ii): OECD: April 2006 new data (Ed. Whitehouse)</i>	I	
			iii) System accrual rates, decreases for early retirement, increases for deferral of retirement	<i>iii) OECD 2005, NSR 2005, MISSOC 2005: EU-25, OECD countries; OECD/ Ed Whitehouse</i>	I	
		SUS07c	System dependency ratio (SDR) in public pension schemes	<i>See below - SUS08a</i>	Core	Outcome indicator
		SUS07d	Lifetime allocation of work and non-work (one point in time) (pension reciprocity duration / employment duration)	<i>Burniaux et al. (OECD) 2004</i>		Outcome indicator, See LM02f
		SUS07e	Take-up Ratio: Number of pensioners receiving public pensions relative to the population aged 65+	<i>EPC 2006; World Bank Pensions Database</i>	I	Outcome indicator
SUS08	(System-Related) Dependency Ratios	SUS08a	System dependency ratio (SDR) in public pension schemes SDR = number of pensioners / number of insured workers	<i>EPC 2006; HV österr. SV; GVG 2002, IMF 2004; NSR 2005</i>	Core	
		SUS08b	Difference between SDR and old-age dependency ratio (as a measure of the system's efficiency)	<i>See SUS08a</i>	Core	Same chart as SUS08a
		SUS08c	Ageing burden indicator (replacement rate * SDR)	<i>Data: see SUS01a and SUS 08a; Concept: Lefèbvre/Perelman 2005</i>	I	
SUS09	Life-Time Allocation	SUS09a	Life cycle support ratio (ratio: the number of working years to the number of retirement years over time * inheritance gains [deaths prior to retirement] * expected growth)	<i>Data and concept: see Settergren / Mikula 2001</i>	I	
		SUS09b	Lifetime allocation of work and non-work (one point in time)	<i>Burniaux et al. (OECD) 2004</i>		See LM02f
		SUS09c	Drop-out-ratio in working age (total number of benefit years of persons younger than 65 vs. total number of labour years of persons older than 15)	<i>Peters et al. 2004 (early retirement pensions, persons aged 15-64, 1990-1998)</i>	II	
SUS10	Private Pension Provision	SUS10a	% of working age population / active population participating in private pension schemes	<i>SPC 2005, OECD 2005b</i>	I	
		SUS10b	Average contribution to income of retirees	<i>SPC 2005, OECD 2005b</i>	I	
SUS11	Gender, Reconciliation of Work and Family	SUS11a	<u>Instrumental</u> indicator: Age differential in statutory retirement age (between men and women)	<i>MISSOC 2005</i>	Core	
		SUS11b	<u>Instrumental</u> : Possibility and fairness of widow pensions	<i>MISSOC 2005</i>	II	
		SUS11c	<u>Instrumental</u> indicator: contribution base for child caring times (how child care does / does not count for pension benefit calculations) (+ figures OECD)	<i>MISSOC 2005, NSR 2005; OECD: to come 2006</i>	Core	
		SUS11d	<u>Instrumental</u> indicator: parental leave schemes, etc. *) <i>this measure will be addressed at a later stage (see Care indicators)</i>	<i>MISSOC 2005; World Bank Database; UNECE</i>	Core	



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