INSTRUCTIONS

on the Labour Force Survey ad hoc module “Transition from work into retirement”
((second quarter of 2006)

The ad hoc module “Transition from work into retirement” is included into the Labour Force Survey (LFS) according to the draft National Programme for Statistical Surveys and the European Commission Regulation №388/2005.

The ad hoc module purpose is to collect information on the process of peoples’ transition from employment into retirement, as well as on the factors that can influence them to continue working (for example: more flexible working hours, more healthy and safety working conditions, possibilities for additional qualification and training, financial interest and others).

Objects of survey are persons who are born within the period 1936 – 1956 (those are mainly persons aged 50-69 years) and who:
- are working at the moment of survey,
- are not working at the moment of survey, but have worked after completion of 49 years of age.

FILLING IN THE QUESTIONNAIRE “TRANSITION FROM WORK INTO RETIREMENT”

The ad hoc module questions are asked after filling in the basic LFS questionnaire.

Information is received from the surveyed persons or from another household member, who is in condition to present it.

In case there is information gathered about a given person on the basic LFS questionnaire, but he/she cannot be interviewed on the ad hoc module “Transition from work into retirement”, the reason have to be pointed in question AM4. In case there is no information gathered about a given person on the basic LFS questionnaire, information on the ad hoc module is not gathered also.

The module questions are structured in two parts:

I-M. EMPLOYED PERSONS
II-M. INACTIVE PERSONS

Questions marked by letters AM (AM2, AM3, AM4) are directed to the interviewer. These questions should not be read to the respondents, but have to be filled in by the interviewer, following the written instructions on each question.

Question AM2. The question AM2 is asked in order to differentiate employed and inactive persons within the observed period. It is necessary because the two groups of persons have to answer different questionnaire questions (parts). Determination of persons as employed and inactive is based on their answers, given in the basic LFS questionnaire. Persons who have answered “Yes” – 1 to at least one of the questions 3, 4, 5, or 6 of the basic LFS questionnaire (Questionnaire on persons) are considered as employed. Code 1 have to be marked for these persons and than they go to part I-M “EMPLOYED PERSONS”. Code 2 have to be marked
in question AM2 for persons who are not employed during the observed period i.e.
persons who have answered “No” – 2 to all of the four questions 3, 4, 5 and 6 of the
basic LFS questionnaire. These persons go to the questions included into the part II-M
“INACTIVE PERSONS”.

FILLING IN PART I-M “EMPLOYED PERSONS”

**Question M1.** The following have to be considered as personal old age pensions:
- old age pensions at standard retirement age;
- pensions provided in case of early retirement (before the standard
retirement age) due to unhealthy working conditions – under the ground, under water,
at the air, construction workers and some driver categories;
- pensions provided in case of early retirement of teachers before the
standard retirement age;
- old age pensions of military personnel;
- old age pensions provided according to the revoked Law on Pensions of
Agricultural Workers-Members of Co-operatives;
- old age pensions provided according to the revoked Decree on Mutual
Insurance of the Members of Production Co-operatives;
- pensions of private craftsmen and tradesmen;
- pensions not connected to the employment as: old age pensions of
private agricultural workers, personal pensions, social old age pensions of persons
aged above 70, who fulfill certain household income criteria.

The following have to be excluded:
- all types of survivors pensions;
- disability pensions.

**Question M2.** Age (in completed years) at which the person is provided any
kind (out of listed in question M1) of old age pension have to be pointed.

**Question M3.** Entitled to old age pension before 2006 are men who have
completed 63 years and women – 58.5 years of age and for who the condition is
fulfilled that the sum of the length of contribution and the age is no less than 100 for
men and 92 for women.

In case the sum of the length of contribution and the age is less than the
pointed above, entitled to old age pension are persons whose length of contribution is
15 years, 12 of which real, and after completion of 65 years of age both for men and
women.

Military personnel is entitled to pension in case of release of service no matter
the age, but the length of contribution of 25 years is required, 2/3 of which at military
service. Civil servants – officers, sergeants and civil persons working at the Ministry
of Interior, officers and sergeants working at the National Investigation Services,
Directorate “Detention Centers” and others are entitled to pension in case of release of
service no matter the age, but the length of contribution of 25 years is required, 2/3 of
which at the pointed position in the institutions listed.

The length of contribution of persons working in conditions of first or second
labour category is recalculated as follows: three years length of contribution in first
category or four years in second category are considered as five years of third category.

Working in conditions of **first labour category** are: miners working under the ground; pilots; airhostesses; persons working in metallurgy; frogmen; crew of ships transporting chemicals, oil fuel and coal; engine drivers of marine ships and others.

Working in conditions of **second labour category** are: public transport drivers, working in settlements, with population more than 300 thousand; drivers of vehicles with carrying capacity more than 12 tons; miners working in open mines; permanently working in radiating environment; engine drivers of locomotives; persons working at stations producing energy based on solid fuel; persons working at weaver departments; some of the persons working in chemistry, metallurgy, construction of high equipment; wind instrument players and others.

Teachers are entitled to old age pension 3 years earlier the standard retirement age in case they have length of contribution as teacher 30 years for men and 25 years for women.

Entitled to social old age pension are persons who have completed 70 years of age and if the annual income of family member at the date of completion of pointed age is less than the sum of the guaranteed minimum income defined for the country for the last 12 months.

**Question M4.** Only persons who are working and at the same time receive old age pension or are entitled to such pension are asked this question. The purpose is to find out if there are financial incentives for the person to continue working. Answer 1 concerns persons who want to increase their pension based on increase of their length of contribution and the respective income before or after the retirement.

Only one answer has to be pointed. In case the person points the both reasons listed in the questionnaire, i.e. to increase the pension size and to provide adequate income, code 1 has to be pointed.

**Question M5.** The purpose is to find out if the certain factors will make people working longer. Not only the current job is taken into account, but also the possible future one.

3 questions are included, corresponding to different factors:

1) more flexible working time, incl. reduced working hours, working on shifts, possibility to work at home;

2) possibilities for gaining qualification corresponding to the job requirements;

3) more safety working conditions and/or more favorable working conditions, incl. conditions suitable for disabled persons. Working conditions, at which the person is working or wants to work if the future have to be considered here, rather any conditions connected to the work as distance from home, wages and similar.
Questions M6 and M7. The approximate age (or age interval) has to be pointed, concerning not only the current job but in principle.

Question M8. Number of years (even the approximate) have to be pointed, during which the person have worked for payment or other type of income, no matter if employed or self-employed. The number of years, during which the person have worked do not coincide with the length of contribution. The whole working period have to be included, no matter if the person have worked under labour contract or not and if the insurance contributions are paid or not. The term “job” in such situation do not coincide fully with the definition applied in filling in the main LFS questionnaire (questions 3, 4, 5 and 6). To a great extent it expresses the person’s understanding for the job character. Usually full-time or part-time job which lasts at least 6 months, incl. as an unpaid family worker, have to be taken into account in defining working years.

The following have to be excluded:
- additional maternal leave for bringing up a child up to 2 years of age;
- unpaid maternal leave for bringing up a child up to 3 years of age (existing up to 2005);
- parental leave;
- compulsory military service;
- ransomed length of contribution for the time of studying at the university.

Also the time have to be excluded, when the persons did some occasional work, as well as the part-time work of pupils and students during their regular study or during vacations.

FILLING IN PART II-M “INACTIVE PERSONS”

Question M9. This is a filter question. For persons who are not working at the moment (during the observed period), but who have worked after completion of 49 years of age, code 1 have to be pointed and the module questions to be asked. In case the person have stopped working before completion of 49 years of age or have not worked at all (code 2 or 3) no more question are asked.

Question M10. Person’s status has to be pointed, just after the last employment.
- Code 1 should be pointed if the person has found a work, which is expected to start or in case he/she expects to restart his/her previous work.
- Code 2 should be pointed if the person has participated in the courses organized by the Unemployment Agency.
- Code 3 should be pointed for persons who immediately after leaving their last job do not have an intention to start any work or to search another one. Code 4 concerns the persons who are not capable for work – disabled, ill and similar.

Question M11. The reason should be pointed, due to which the person stops working.
- Cases when the person has been forced to leave his/her job due to the entitlement to pension have to be included in code 2.
Problems connected to the job are included in code 5 like:
- inconvenient working hours;
- unhealthy working conditions;
- high tension, stress;
- insufficient or inappropriate qualification;
- unfavorable relations with the employer or colleagues.

More favorable financial conditions in case of leaving the job have to be included in code 6 – receiving benefit or other payment connected to the leaving of job.

Leaving the job due to personal or family reasons, different from bringing up children or care for disable person have to be included in code 7 as well as the following: the person prefers to leave his/her job after entitlement to pension, no matter that there are possibilities existing to continue working; it is no necessary for the person to work and similar.

Only one reason has to be pointed. In case the person points more than one reason and face difficulties to point the main one, the reason given the lower code have to be chosen.

**Question M12** aims to define the persons who have to present information on the age to which they are planning to continue working (questions M13 and M14).

**Questions M13 to M18, as well as question M20** are similar to the questions included in part I-M.

**Question M19.** The question includes some sub-questions. Each of them is asked separately. The following have to be excluded (for all sub-questions): all types of survivors pensions; unemployment benefits; all types of family and child allowances; monthly allowance on municipal housing.

1) Disability pensions include pensions provided in case of:
   - sickness, incl. provided under the revoked Law on Pensions of Agricultural Workers and Members of Cooperatives and under the Decree on Mutual Insurance of the Members of Production Co-operatives, pensions of military personnel, officers and sergeants;
   - accident at work and occupational disease, incl. provided under the revoked Law on Pensions of Agricultural Workers and Members of Cooperatives and under the Decree on Mutual Insurance of the Members of Production Co-operatives, pensions of military personnel, officers and sergeants;
   - military disability;
   - civil disability;
   - social disability pension.

2) Cash allowances and other periodical cash benefits include:
1. monthly cash allowance (article 9 of the Regulations for application of the Law on Social Assistance of low income persons);

Monthly cash allowance (article 9 of the Regulations for application of the Law on Social Assistance) are provided persons and families, which income is lower than the differentiated minimum income (DMI) and who meet certain conditions concerning address registration, property and financial status, registration at Unemployment Agencies and others.

2. supplements to the miners, war-invalids and repressed persons pensions
3. monthly allowances for social integration of disabled (according to the Law on Social Integration of Disabled): on transportation services; on information and telecommunication services; on accessible information; on dietetic nutrition and medicines.

3) Other personal benefits in kind include:

- Target allowance for heating (Regulation №5/30.05.2003 of the Ministry of Labour and Social Policy)
- Social services offered by the municipalities or specialized institutions like:
  - Personal assistant
  - Social assistant
  - Home assistant
  - Social patronage at home
  - Daily centers
  - Center for social rehabilitation and integration
  - Public dining-rooms

Question AM3. The duration of interview have to be filled in (in minutes), concerning module “Transition from work into retirement” only.

Question AM4. In case the person is interviewed on the basic LFS questionnaire, but cannot be interviewed on the module “Transition from work into retirement”, the respective reason have to be pointed here.