

Group/household/respondent No :

_____ / _____ / _____

Name: _____

First name: _____

Mobile: _____ / _____ / day: time:

Tel.: _____ / _____ / day : time:

CONTINUOUS LABOUR FORCE SURVEY 2012

Ad hoc module "Transition from work to retirement"

Second quarter 2012

Questions to be asked to all persons aged 50 to 69 who have a job (whether or not they have worked during the reference week) or have worked after the age of 49.

Questions in this module must be answered by the respondents themselves. Proxy answers are not allowed!

To be completed for all persons aged 50 to 69:
- who have a job (whether or not they have worked during the reference week) (all persons who have answered Q5)
OR
- who do not have a job or have taken a full career break or time credit for more than 3 months (Q3 = 2 or Q4 = 1) AND who have worked after the age of 49 (Q61 (last year in which M_ has worked) - year of birth > 49).

(INT Answer the two following questions based on the answers from the individual questionnaire. The answers can be checked against the filtering mentioned above.)

Answered Q5 (professional status):
Yes : has a job
No : has no job

**Q61 (year in which the previous job was ended) | _____ | -
Year of birth | _____ | = | _____ |**

O. RETIREMENT

Finally there are a few additional questions on the transition from work to retirement. When we refer to pensions, we mean regular and periodic payments. Non-recurrent benefits or benefits in kind are not included.

| Go to question : | ↓ |
|--|---------------|
| 106. First I will read to you a number of pension schemes and benefits. Could you tell me if you are <u>currently</u> receiving <u>one or more</u> of the following pensions or benefits <u>on a regular basis</u> and from what age you have received them? Are you receiving... (INT. Read one answer after the other – Multiple schemes possible.) | |
| 106a <u>a legal old-age pension?</u> Yes 1 No 2 | 106a1 106b |
| 106a1 From what age? _____ | 106b |
| 106b <u>a supplementary pension through your employer or through an arrangement for self-employed persons?</u> Examples are group insurance, a pension fund or a supplementary old-age pension for self-employed persons. Yes 1 No 2 | 106b1 106c |
| 106b1 From what age? _____ | 106c |

| Go to question : | ↓ |
|---|--------------------|
| 106c <u>a supplementary pension through an individual arrangement</u> such as pension savings or an individual life insurance? Yes 1 No 2 | 106c1 106d |
| 106c1 From what age? _____ | 106d |
| 106d <u>an old-age pension but you are not sure if it is a legal, supplementary or individual pension?</u> Yes 1 No 2 | 106d1 106e |
| 106d1 From what age? _____ | 106e |
| 106e <u>a bridging pension (full-time or part-time)?</u> Yes 1 No 2 | 106e1 106f |
| 106e1 From what age? _____ | 106f |
| 106f <u>a disability pension or benefit</u> , such as a pension for permanent physical unfitnes, early retirement benefits in case of reduced ability to work, benefits for accidents at work or occupational illnesses due to permanent disability, income replacement allowance for disabled persons? Yes 1 No 2 | 106f1 106g |
| 106f1 From what age? _____ | 106g |
| 106g <u>a survivor's pension?</u> Yes 1 No 2 | 106g1 E16 |
| 106g1 From what age? _____ | E16 |
| E16: - If M_ receives <u>an old-age pension</u> (at least once "Yes" to Q106 a, b, c or d) - If M_ does <u>not</u> receive <u>an old-age pension</u> but another pension ("Yes" to one of the questions 106e, f, g and "No" to all questions 106 a, b, c, d) - If M_ does <u>not</u> receive <u>any kind of pension</u> ("No" to all items of Q106) | 107a 108 115 |

| Go to question : | | ↓ |
|--|------|-----|
| 107a. Did you retire early with one of the following schemes, i.e. earlier than the legal retirement age? | | |
| (INT. Read one answer after the other – multiple answers possible) | | |
| - Yes, <u>with the early retirement pension</u> | 1 | ↔ |
| - Yes, <u>with a disability pension or benefit</u> , such as a pension for permanent physical unfitness, an early retirement benefit in case of reduced ability to work, a benefit for accidents at work or occupational illnesses due to permanent disability, an income replacement allowance for disabled persons | 2 | ↔ |
| - Yes, <u>with a bridging pension</u> | 3 | ↔ |
| - No, you did not retire early..... | 4 | E17 |
| E17: - If M_ <u>retired early</u> (code 1, 2 or 3 to Q107a) | 107b | |
| - If M_ <u>did not retire early</u> (code 4 to Q107a) | E18 | |
| 107b. From what age did you retire early with one of the aforementioned schemes? | E18 | |
| (INT. If more than one scheme has been indicated for Q107a, take the age on which the respondents received their first pension.) | | |
| _ _ | | |
| 108. I will now read to you a number of pension schemes. Could you tell me for which schemes you have already gained <u>pension rights</u> for an <u>old-age pension</u>? | | |
| (INT. Read one answer after the other – multiple answers possible) | | |
| (INT. If M_ is gaining pension rights for an old-age pension but does not know for which scheme, answer "No" to Q108a, b and c and "Yes" to Q108d) | | |
| 108a in the <u>legal scheme</u> | 1 | ↔ |
| 108b in the <u>supplementary scheme</u> through the <u>employer</u> or through an arrangement for <u>self-employed persons</u> . Examples are <u>group insurance</u> , pension fund or supplementary old-age pension for self-employed persons..... | 2 | ↔ |
| 108c in the <u>supplementary scheme</u> through an <u>individual arrangement</u> such as pension savings or an individual life insurance | 3 | ↔ |
| 108d. In <u>one of the above schemes</u> but you do not know which one | 4 | E18 |
| P. PERSONS RECEIVING A PENSION | | |
| E18: - If M_ <u>does not have a job</u> (no answer to Q5) <u>and did not seek a job during the reference month</u> ("No" to Q44) <u>and did not find a job</u> ("No" to Q45). | 109 | |
| - If M_ <u>has a job</u> (answer to Q5)..... | 112 | |
| - If M_ <u>does not have a job</u> (no answer to Q5) <u>but is seeking a job</u> ("Yes" to Q44) <u>or has already found one or is resuming one after a career break</u> (code 0-5 to Q45). | 120 | |

| P1. PERSONS RECEIVING A PENSION WHO HAVE NO JOB AND ARE NOT SEEKING ONE | | Go to question : | | ↓ |
|--|---|------------------|--|---|
| 109. What was the <u>primary</u> reason to stop working at the moment you retired from the labour market? | | | | |
| (INT. Indicate the primary reason - Only 1 answer possible) | | | | |
| - There were <u>favourable financial arrangements</u> to stop working | 1 | 110 | | |
| - You <u>lost your job</u> and could not find new work | 2 | 110 | | |
| - You had reached the <u>maximum legal retirement age</u> | 3 | 110 | | |
| - You had reached the <u>minimum legal retirement age</u> | 4 | 110 | | |
| - Other <u>job-related reasons</u> such as inconvenient working hours, stress, demanding job, employer's attitude etc. | 5 | 110 | | |
| - Own <u>health</u> or <u>disability</u> | 6 | 110 | | |
| - <u>Family</u> or <u>care-related</u> reasons | 7 | 110 | | |
| - Other <u>personal</u> reasons (INT. Describe) | 8 | 110 | | |
| 110. Did you wish to stay longer at the moment you retired from the labour market or your last job? | | | | |
| - Yes | 1 | 111 | | |
| - No | 2 | 111 | | |
| 111. Did you reduce your number of working hours as a step towards full retirement? | | | | |
| (INT. Only 1 answer possible) | | | | |
| - Yes, <u>before you received</u> your first old-age pension..... | 1 | 119 | | |
| - Yes, <u>since or after you received</u> your first old-age pension you yourself made the <u>choice</u> to work fewer hours..... | 2 | 119 | | |
| - Yes, <u>since or after you received</u> your first old-age pension. Otherwise you would have exceeded the <u>income ceiling</u> for allowed employment..... | 3 | 119 | | |
| - No | 4 | 119 | | |
| P2. PERSONS RECEIVING A PENSION WHO HAVE A JOB | | | | |
| 112. Have you reduced your number of working hours as a step towards full retirement? | | | | |
| (INT. - Only 1 answer possible) | | | | |
| - Yes, <u>before you received</u> your first old-age pension..... | 1 | 113 | | |
| - Yes, <u>since or after you received</u> your first old-age pension. You yourself made the <u>choice</u> to work fewer hours..... | 2 | 113 | | |
| - Yes, <u>since or after you received</u> your first old-age pension. Otherwise you would have exceeded the <u>income ceiling</u> for allowed employment..... | 3 | 113 | | |
| - No | 4 | 113 | | |
| 113. What is the <u>primary</u> reason to keep working? | | | | |
| (INT. Indicate the primary reason - Only 1 answer possible) | | | | |
| - You want to establish or increase future retirement pension entitlements | 1 | 114 | | |
| - You want to provide a sufficient personal or household income | 2 | 114 | | |
| - A combination of the above. You want to establish or increase future retirement pension entitlements and provide a sufficient personal or household income. | 3 | 114 | | |
| - You keep working because of non-financial reasons, such as job satisfaction, social contacts etc. | 4 | 114 | | |

| Go to question : | ↓ |
|---|-----|
| 114. From what age are you planning to stop all work for pay or profit? | |
| - The planned age __ __ 1 | 120 |
| - You do not know yet but it will most likely be: | |
| In more than one year up to three years 2 | 120 |
| In more than three years up to five years 3 | 120 |
| In more than five to ten years 4 | 120 |
| In more than ten years 5 | 120 |
| - You do not know yet 6 | 120 |
| Q. PERSONS NOT RECEIVING A PENSION: | |
| 115. I will now read to you a number of pension schemes. Could you tell me for which schemes you have already gained <u>pension rights</u> for an <u>old-age pension</u>? | |
| (INT. Read one answer after the other – multiple answers possible) | |
| (INT. If M_ is gaining pension rights for an old-age pension but does not know for which scheme, answer "No" to Q115a, b and c and "Yes" to Q115d) | |
| 115a in the <u>legal scheme</u> 1 | ↔ |
| 115b in the <u>supplementary scheme</u> through the <u>employer</u> or through an arrangement for <u>self-employed persons</u> . Examples are group insurance, pension fund or supplementary old-age pension for self-employed persons..... 2 | ↔ |
| 115c in the <u>supplementary scheme</u> through an <u>individual arrangement</u> such as pension savings or an individual life insurance 3 | ↔ |
| 115d In <u>one of the above schemes</u> but you do not know which one 4 | E19 |
| E19: - If M_ has a <u>job</u> (answer to Q5) 116 | |
| - If M_ does <u>not</u> have a <u>job</u> (no answer to Q5) <u>but is seeking</u> a job ("Yes" to Q44) <u>or has already found</u> one or is resuming one after a career break (code 0-5 to Q45). 117 | |
| - If M_ does <u>not</u> have a <u>job</u> (no answer to Q5) <u>and did not seek</u> a job during the reference month ("No" to Q44) <u>and did not find</u> a job ("No" to Q45). 119 | |
| 116. Have you reduced your number of working hours as a step towards full retirement? | |
| - Yes..... 1 | 117 |
| - No 2 | 117 |
| 117. Once you are receiving an old-age pension, do you expect to continue working or looking for work? | |
| (INT. - Only 1 answer possible) | |
| - Yes, you will continue working or looking for work because of <u>financial reasons</u> 1 | 118 |
| - Yes, you will continue working or looking for work because of <u>other reasons</u> 2 | 118 |
| - No, you will stop working immediately 3 | 118 |
| - No, you will stop working before you receive an old-age pension 4 | 118 |
| 118. From what age are you planning to stop all work for pay or profit? | |
| - The planned age __ __ 1 | E20 |
| - You do not know yet but it will most likely be: | |
| In more than one year up to three years 2 | E20 |
| In more than three years up to five years 3 | E20 |
| In more than five to ten years 4 | E20 |
| In more than ten years 5 | E20 |
| - You do not know yet 6 | E20 |

| E20: - If M_ does not have a job (no answer to Q5) 119 | |
|---|------|
| - If M_ has a job (answer to Q5)..... 120 | |
| Go to question : | ↓ |
| 119. What was your primary labour situation immediately after ending your last job or self-employed activity? | |
| (INT. - Only 1 answer possible) | |
| - You were unemployed 1 | 120 |
| - You enjoyed a bridging pension 2 | 120 |
| - You were retired or took early retirement 3 | 120 |
| - You were put in a position of non-activity before retirement 4 | 120 |
| - You had a long-term illness (longer than 3 months) or were disabled 5 | 120 |
| - You were in a different labour situation, such as full career break or time credit for more than three months 6 | 120 |
| R. ALL PERSONS: TRANSITION FROM WORK TO RETIREMENT | |
| 120. Would <u>more flexible working hours</u> have contributed or contribute to your decision to continue working? | |
| - Yes or to a certain degree 1 | 121 |
| - No 2 | 121 |
| 121. Would more possibilities to <u>improve knowledge and/or skills</u> have contributed or contribute to your decision to continue working? | |
| - Yes or to a certain degree 1 | 122 |
| - No 2 | 122 |
| 122. Would <u>better occupational health and safety</u> have contributed or contribute to your decision to continue working? | |
| - Yes or to a certain degree 1 | stop |
| - No 2 | stop |

