

# **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 establish 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 6 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).