CONTINUOUS LABOUR FORCE SURVEY:
AD HOC MODULE 2006: “CONCLUSION OF THE WORKING ACTIVITY AND TRANSITION INTO RETIREMENT”

Interviewer’s Guide
Introduction

In accordance with community regulations, the continuous Labour Force Survey inserts, every year, an “ad hoc module” in its standard questionnaire. Because the purpose of such module is to examine topics specifically inherent to the labour market, its contents vary from one year to another. From some time now, all European Union countries present this module during the 2° quarter of the year (April, May, June), in order to achieve a gradual but complete harmonisation process.

The 2006 ad hoc module “Conclusion of the working activity and transition into retirement” (EC n.388/2005) meets the need to extend the statistical wealth available regarding patterns, times and modalities of retirement from work of people aged 50 and over.

More in detail, it mainly aims to:

1) Gather information on the transition phase into full retirement from the labour market: duration of the working career, planned and actual age of retirement, planned and actual modalities for leaving the labour market, type of pension received, etc.

2) Identify the reasons that most influenced to decision to definitively leave the working activity and the work context-related factors that might, on the other hand, influence the decision to postpone retirement.

The reference population includes all employed persons aged 50 to 69 or formerly employed persons who have stopped working after age 49.

Two subgroups are identified within the reference population:

- Persons who declare to not having stopped their working activity (employed and non-employed)
- Persons who have concluded their working activity and have already retired.

Though each subgroup is to answer the ad hoc module section addressed to them, some questions are common to both subgroups.

The 2006 ad hoc module is inserted in a special section HOC, right after section H of the standard questionnaire. However, the previous sections of the questionnaire already help identify correctly the reference population, in particular:
The General Card (SG.19, SG.21);
Section C (C.1);
Section E (E.2, E.3, E.14, E.15);
Section F (F.10).

By correctly recording the information to the previous questions, it is thus possible to identify univocally the respondents that are to answer the ad hoc module’s questions.

The survey period of the ad hoc module takes place during the 2° quarter of 2006. Hence, it is to be supplied to all families whose reference period is included between April and June of the current year.

SECTION HOC
Conclusion of the working activity and transition into retirement

An initial script that must necessarily be read to all interviewees introduces the topic and summarises its purpose.

**Script HOC1 (to be necessarily read)**

*The following questions regard the transition phase from work into full retirement.*

1. **Identification of pension receivers**

The ad hoc module first aims at identifying all persons who receive one or more pension scheme allowances.

Even though the requests of the European Statistical Institution regard only some types of pension, it was decided to take the opportunity the module offers and extend the informative wealth available to the population band aged 50 and over, an evermore important band due to the demographic gradual ageing and to the gradual extension of the active life.

Hence, question HOC1 considers all types of pension.
Question HOC1. Identification of persons who receive a pension

**HOC1** Does “NAME” receive a pension? Consider any type of pension

- Yes 1
- No 2
- Does not know 997
- Does not answer 998

An on-line help is provided for question HOC1:
“Consider all types of pension, subsequently identified in question HOC2”.

Though being addressed to all persons of the reference target, question HOC1 is not displayed to those who, in the previous sections E (E14=1; E15=1) and F (F10=7), declared to receive an old-age or retirement pension.

It is important to specify that, if the respondent is already entitled to a pension but is still waiting for the first payment, then the respondent must answer “YES”.

After identifying all persons who benefit from a pension scheme allowance, the next step is to focus on the type of pension received.

Because respondents could benefit from several pensions, the questionnaire provides for the possibility of giving more than one answer.

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**Note:**

**Question HOC2. Identification of the type of pension received**

**HOC2** What type of pension do you currently receive? *(More than one answer possible)*

- Old-age pension 1
- Retirement pension 2
- Disability/Sick pension 3
- Inability pension 4
- Accident at work (by Inail) 5
- Integrative pension (voluntary fund) 6
- Social pension 7
- Civil invalidity pension 8
- Survivor’s/Widow’s pension 9
- International, Supplementary 10
- Other (specify) *(HOC2_a)* 996
- Does not know 997
- Does not answer 998
The on-line help provided for question HOC2 defines the types of pension indicated in the answer modalities:

**“Retirement pension.”** In order to benefit from this employment pension, it is necessary to meet the following requisites:

- 35 years of contributions and minimum age of 57 for employed workers
- 35 years of contributions and minimum age of 58 for self-employed (artisans, traders and direct farmers).

In case of a higher number of contribution years, the requisite regarding the minimum age can be left out. In such case, it is necessary to have:

- A minimum of 38 years of contribution for employed workers
- A minimum of 40 years of contributions for self-employed.

**Old-age pension.** In order to benefit from this employment pension, it is necessary to meet the following requisites:

- Age between 57 and 65 for men and women in the defined contribution pension scheme; 65 years for men and 60 years for women in the defined benefit pension scheme
- A minimum of 5 years of contributions in the defined contribution pension scheme; 20 years (including retroactive payments, deemed contributions, voluntary contributions) in the defined benefit pension scheme
- End of work relationship.

The defined contribution calculating system is the one currently in force. The defined benefit calculating system is applied to workers who have reached at least 18 years of contributions on the 31st of December 1995.

**Disability/Sick pension.** To obtain this pension, it is necessary to meet the following requisites:

- Physical or mental illness (confirmed by a medical examiner) that causes a permanent reduction to less than one third of the capacity to work
- A minimum of 5 years of contributions of which three paid during the five years before the request for pension.
This pension can be received even when carrying out a working activity. Both employed workers and self-employed are entitled to such pension.

**Inability pension.** To obtain this pension, it is important to carry no working activities and to meet the following requisites:

- Physical or mental illness (confirmed by a medical examiner) that causes a complete and permanent impossibility to perform any working activity.
- A minimum of 5 years of contributions of which three paid during the five years before the request for pension.

Both formerly employed workers and formerly self-employed are entitled to such pension.

**Pension for accident at work (paid by Inail – Italian Insurance Institution for Accidents at Work).** To obtain this pension, it is necessary to meet the following requisites:

- Physical or mental illness (confirmed by a medical examiner) that causes a permanent reduction of the capacity to work following an accident during the normal work activity.
- A degree of permanent disability not inferior to 6%.

**Integrative pension (voluntary).** To obtain this complementary pension (voluntary fund pension), it is necessary to meet the following requisites:

- Minimum number (required by the paying Institution) of voluntary contribution years paid by the worker during his/her working career
- Minimum age as requested by the paying Institution.

**Social pension.** To obtain it, it is necessary to meet the following requisites:

- To be an Italian citizen residing in Italy
- Minimum age of 65
- To have an income equal to zero or a very low income.

This welfare benefit is entitled also in case no working activity has ever been performed.

**Civil invalidity allowance.** It is a welfare allowance entitled to:

- Total or partial civil invalids
• Deaf-mute and blind persons with no personal income or a very low income.

**Survivor’s/Widow’s pension.** Upon the death of the worker, it goes to the components of his/her family nucleus. It can be:

• A reversibility pension when the deceased person was already retired from work
• An indirect pension when the person was still working at the time of death.

**International pension.** It allows a worker to benefit from the contributions paid during the period of the working activity performed abroad. The entitlement to this pension is determined adding the periods of work performed in Italy and abroad, while each country determines the amount in relation to the years of contributions. For example: a worker has paid 18 years of contributions in Italy and 12 in France. Upon his/her retirement age, the amount of the Italian pension will be calculated over the 18 years of contributions paid, while France will pay the International pension based on the 12 years of contribution.

**Supplementary pension.** It is added to the principal pension. To obtain it, it is necessary to meet the following requisites:

• To already be entitled to a pension paid by some other Compulsory Insurance Fund
• To have reached the retirement age (65 for men and 60 for women)
• To have ended all working relationships.

For example: a worker has paid 4 years of contributions to the INPS (Italian Social Security Institution) and 37 years of contributions to the Government. Should he/she already receive the pension the government pays, he/she is entitled to a complementary pension paid by the INPS for the 4 years of contributions paid”.

This list, however, is not exhaustive of the whole reality that characterises the welfare and social security systems. If the interviewee receives a type of pension that is not provided in the answer modalities (e.g. war pension), the interviewer must codify “Other” and enter the information acquired in the special field.

Finally, the answer modalities must be read to the interviewee only in case of necessity.

Once the subgroup of persons who benefit from a pension has been identified, questions HOC3 to HOC10 surveys the age at which the interviewee started to receive such pension.
Questions Identification of the age at which the person started to receive his or her pension allowance(s).

<table>
<thead>
<tr>
<th>Questions</th>
<th>HOC3/HOC10</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOC3</td>
<td>How old were you when you first started to receive the old-age or retirement pension?</td>
</tr>
<tr>
<td></td>
<td>Age</td>
</tr>
<tr>
<td></td>
<td>Does not know 997</td>
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<tr>
<td></td>
<td>Does not answer 998</td>
</tr>
<tr>
<td>HOC4</td>
<td>How old were you when you first started to receive the disability/sick pension?</td>
</tr>
<tr>
<td></td>
<td>Age</td>
</tr>
<tr>
<td></td>
<td>Does not know 997</td>
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<tr>
<td></td>
<td>Does not answer 998</td>
</tr>
<tr>
<td>HOC10</td>
<td>How old were you when you first started to receive the international pension or the supplementary pension?</td>
</tr>
<tr>
<td></td>
<td>Age</td>
</tr>
<tr>
<td></td>
<td>Does not know 997</td>
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<td>Does not answer 998</td>
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</tbody>
</table>

As previously stated, respondents can give more than one answer to HOC2.

The electronic questionnaire will display to the surveyor only the questions, among those from HOC3 to HOC10, the interviewee is requested to answer based on his/her answer to HOC2.

If the respondent declares an age that is not coherent with the type of pension received, the electronic questionnaire will signal such incompatibility.

Most of the coherence rules are provided as “soft” because of the highly complex welfare system in Italy, which distinguishes requisites and schemes first between defined contribution scheme and defined benefit scheme, as well as based on gender, type of work carried out, whether the person is employed or self-employed, etc. In any case, the electronic questionnaire signals any “suspicious” situation by means of a message so that the interviewer can require to confirm the answer given.

As regards persons who declared to not benefit from any pension, question HOC11 surveys the share of persons who, though being already entitled to an old-age or retirement pension from work, still do not receive it because they have chosen to continue working.

The question is one of the variables, which the European Statistical Institution is greatly focusing on. Hence, the surveyor must ensure that the interviewee has indeed understood the content of the question, leaving him/her enough time to reflect on it.
In this case, the interviewer must take into account the requisites to be met in order to be entitled to the old-age or retirement pensions, especially the old-age pension. Because the target of respondents is mostly made up of employed persons, the chances of surveying “potential” old-age pensions are much higher. Hence, the surveyor must keep in mind the interviewee’s years of contributions rather than his/her actual age. For example, a 56-year old nurse might have reached the years of contributions necessary for being entitled to a retirement pension, even though the age requisite has not yet been met. The answer modality “2” includes both persons who are not entitled to a pension because of not meeting some requisite, and persons who have still not developed any pension fund plan. The interviewer must carefully deal with this section since question HOC13 surveys in a very precise way the interviewee’s years of contributions.

### 2. Duration of working career and years of contribution

One of the objectives of the European strategy is to increase the employment rate among persons aged 50 and over. This objective can be reached, prolonging the population’s active life or, in other terms, if the average age of persons who retire tends to gradually increase. Therefore, it is necessary to carefully monitor the duration of the working lives, as well as the corresponding periods of contribution. Question HOC12 surveys the duration of the interviewee’s working career. All persons of the reference target must answer, whether employed, previously employed but still active or retired from work.
Question HOC12. Identification of the overall duration of the working career

HOC12. How many years in total has “NAME” worked?

- Number of years
- Does not know
- Does not answer

More in detail, the question aims at surveying the overall duration of the respondent’s working career, and that from the first significant job worked. Consequently, the interviewer must first specify that the duration does not refer only to the last job performed but to the whole working career and then, that this calculation must be done from the first significant job performed.

A “first significant job” does not include the occasional jobs performed during summer breaks nor part-time jobs (even if done on a continuous basis) carried out as a student.

Once the surveyor has explained the concepts of “overall duration of the working career” and of “first significant job”, the interviewee is to give the information requested based on the online help provided for this question:

The following periods are to be excluded:

- Interruption periods between one job and another
- Parental leave (such as leave for personal reasons).

On the other hand, the following ones must be included:

- Maternity/paternity leave (including cases of adoption)
- Temporary inability to work (e.g. due to an illness)
- Reduction of the company activity for economic reasons.

Of course, the interviewer must bear in mind not only the community regulations but also the difficulties in concretely implementing them. In other words, should it be necessary, the interviewer can accept an approximate measurement the respondent gives regarding his/her working career’s overall duration.
After having obtained information on the duration of the working career, the questionnaire goes on with the years of contributions paid. In particular, it surveys the contribution situations of persons who have chosen to retire from work.

Persons who, at question HOC2, have said to benefit from an old-age or retirement pension from work, must answer HOC13.

<table>
<thead>
<tr>
<th>Question HOC13. Identification of the years of contributions paid to receive the pension</th>
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<tbody>
<tr>
<td>HOC13. How many years of contributions have been paid to receive the pension? Consider also any retroactive payment periods (e.g. university, military service)</td>
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</tbody>
</table>

- Number of years
- Does not know

Most probably, and especially in the presence of regular working careers, the number of career years surveyed at HOC12 will coincide with the number of contribution years surveyed at HOC13.

Just as in the previous question, in this case too, approximate measurement of contribution years can be accepted.

The subgroup of old-age or retirement pensioners from work who have answered question HOC13, must state whether, during the transition from work into retirement, they have benefited from some incentive to retire before having reached the legal limits.

In other words, the question tends to identify all cases of anticipated retirement, Italian word for “early retirement” as used in international literature.

<table>
<thead>
<tr>
<th>Question HOC14. Use of incentives to retire before the legal limits</th>
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<tbody>
<tr>
<td>HOC14. Has “NAME” received some incentives to retire before the limits established?</td>
</tr>
</tbody>
</table>

- Yes
- No
- Does not know

Because of the difficulty of having to explain the concept of “incentive” to the interviewee, an on-line help has been provided:
“Incentives are measures that go beyond the normal pension scheme: the so-called “scivoli” (chutes) in the years of contributions, the special end-of-service lump sums, private agreements with the employer, etc.

In any case, the “YES” answer entails:

• An early retirement compared to the normal retirement age (generally before 65 years of age for men and 60 for women).
• Having benefited from some incentives in relation to the requisites and/or standard scheme provided”.

Here too, the surveyor must use the on-line help to clarify as much as possible the content of the question, giving the interviewee time to answer. The pilot survey, indeed, showed that quicker is the question asked, less efficient it becomes, thereby causing for an increase in the percentage of negative answers.

3. Reasons for retiring and age planned for retirement

The following questions of the ad hoc module aims at acquiring information on the conditions and reasons for retiring and on the age, planned and actual, at which the respondents wish to definitively end their working career.

The first three questions, addressed to non-employed persons, regard their status right after having concluded the last job in order to distinguish the persons who declare to have retired from work from those who declare to be in a different condition.
Question HOC15. Status of the interviewee after concluding the last job

HOC15. After having concluded the last job, was “NAME”:

- Unemployed
- In mobility, Cigs
- In retirement from work
- Long term sick or disabled
- Other condition (specify) *(HOC15_a)*
- Does not know
- Does not answer

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<td>996</td>
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<td>998</td>
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</tbody>
</table>

The interviewer must evaluate whether it is necessary to read the answer modalities provided. The question requires, indeed, to be dealt with much care since it is based on the interviewee’s self-perception.

The answer modalities can all be applied to formerly employed workers and to formerly self-employed.

The most delicate phase of this question is the possible “limit” situations that could characterise some respondents. The pilot survey, indeed, revealed that some interviewees, who were in job mobility, tended to consider themselves as already fully retired, or as retired from work. Hence, the interviewer is responsible for assuming the necessary information, especially as regards the answer modality “2”.

Should the interviewee declare a condition that is not provided among the answer modalities, the interviewer must codify “Other condition” and enter the information acquired in the special field.

All persons who declare to have retired from work, must explain the main reason behind the decision to retire.
The purpose of the question is to distinguish three different groups of reasons: personal, institutional and economic. The answer modalities provided are functional to such purpose and measured for people aged 50 and over.

Nonetheless, the experience drawn from the pilot survey has shown that the correct codification of the interviewee’s answer, in some cases, can result not easy. Therefore, the interviewer is requested to read the answer modalities provided.

The answer modality 1 does not include voluntary resignations.

The answer modality 2 includes situations where the interviewee was obliged to retire due to age limits reached. Vice versa, it does not include situations of retirement upon reaching the minimum and/or normally provided age limit.

The answer modality 3 includes voluntary resignations, early and/or facilitated retirement.

The answer modality 4 includes situations where the person retired due to professional competences that had become obsolete or inadequate.

The answer modality 6 includes retirements due to a lack of care services.

The answer modality 7 includes retirements due to personal or family reasons, such as lifestyle, lack of necessity. It also includes cases of retirement upon reaching the minimum and/or normally provided age limit.

When the interviewee has some difficulty in finding the main reason, the surveyor must assist him or her in identifying first the group of reasons and then within the group, the most appropriate codification code.
Should the interviewee declare a reason that is not provided in the answer modalities, the surveyor must codify “Other reason” and enter the information acquired in the special field.

All persons who declare to be in some condition other than retired, and to not being currently employed, are asked whether they intend to go back to work in the future.

<table>
<thead>
<tr>
<th>Question HOC17. Desire to go back to work in the future.</th>
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</thead>
<tbody>
<tr>
<td>HOC17. Does “NAME” intend to go back to work in the future?</td>
</tr>
<tr>
<td>• Yes, he/she still wants to work</td>
</tr>
<tr>
<td>• No, he/she has definitively stopped working</td>
</tr>
<tr>
<td>• Does not know</td>
</tr>
<tr>
<td>• Does not answer</td>
</tr>
</tbody>
</table>

The interviewer must evaluate where it is necessary to complete the question with “Consider all works from which you receive an earning or any unpaid job only if carried out on a regular basis at a family member’s company”.

The group of persons among the non-employed who do not intend on retiring must be united to the group of persons of the reference target that are employed.

Questions HOC18 and HOC19, indeed, survey the planned age for retirement, one of the objectives of this section as previously mentioned.

<table>
<thead>
<tr>
<th>Question HOC18. Planned aged for retirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOC18. At what age does “NAME” intend to definitively stop working?</td>
</tr>
<tr>
<td>• Age</td>
</tr>
<tr>
<td>• He/she plans to work as long as possible</td>
</tr>
<tr>
<td>• Does not know</td>
</tr>
<tr>
<td>• Does not answer</td>
</tr>
</tbody>
</table>

As regards question HOC18, the interviewer must verify whether the respondent has already planned a precise age (to be obviously declared in the first answer modality), or whether he or she intends to work as long as possible (the second answer modality).

The interviewer should not pressure the respondents who have not yet planned a precise age for retirement.
The answer modalities “997” and “998” lead to question HOC19, which examines the not well-defined situations. Therefore, when asking question HOC18, the interviewer should not let the respondent reflect too long on the age at which he or she intends to retire, since all those who are not sure yet can answer more easily the following question.

Question HOC19 proposes various pre-codified possibilities, organised around three age bands.

<table>
<thead>
<tr>
<th>Question HOC19. Approximate planned age for retirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOC19. Though not knowing exactly at what age, when does “NAME” thinks to stop working?</td>
</tr>
<tr>
<td>• Before 60 years old 1</td>
</tr>
<tr>
<td>• Between 60 and 64 years old 2</td>
</tr>
<tr>
<td>• 65 years old or after 3</td>
</tr>
<tr>
<td>• No exact planned age 4</td>
</tr>
<tr>
<td>• Does not know 997</td>
</tr>
<tr>
<td>• Does not answer 998</td>
</tr>
</tbody>
</table>

Here, the main difficulty for the interviewer is to take into account the interviewee’s age when reading the answer modalities, which will have to be coherent with their actual age. For example, if the interviewee is 62 years old, there is no point for the interviewer to read answer “1” (“before 60 years old”); likewise, if the interviewee is 65 years old, the answer modalities “1” and “2” become rather unnecessary.

4. Voluntary prolongation of the working career

Another aspect inherent to the conclusion of a working career that the ad hoc module deals with regards the voluntary prolongation of the activity.

After having surveyed the planned age for retirement among those still employed and who benefit from a pension from work, or who are entitled to it, the following objective is to identify
the share of persons who have received or who are receiving a monetary incentive for having prolonged the working career.

<table>
<thead>
<tr>
<th>Question HOC20. Benefit of money incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOC20. Has “NAME” received or receives a money incentive to continue working?</td>
</tr>
<tr>
<td>• Yes                                             1</td>
</tr>
<tr>
<td>• No                                              2</td>
</tr>
<tr>
<td>• Does not know                                   997 I_</td>
</tr>
<tr>
<td>• Does not answer                                 998 I_</td>
</tr>
</tbody>
</table>

Here, it is important to clarify the concept of “incentive”. It could, indeed, refer to a sum of money received on a regular basis (e.g. together with the monthly wage), or to a lump-sum bonus received in the past. What is important is that incentive must directly relate to the decision to prolong the working career.

As regards HOC20, the experience from the pilot survey revealed the necessity to proceed with asking the question not too quickly but by stimulating the interviewee to reflect on the question. On the other hand, it also showed that, without a correct understanding of the concept of incentive, the percentage of negative answers tend to greatly increase. Moreover, a high percentage of “NO” tends to affect also the next question, to which HOC20 serves as filter.

Persons who answer positively must indeed answer question HOC21 regarding the main reason for prolonging the working career.

<table>
<thead>
<tr>
<th>Question HOC21. Main reason for continuing the work activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOC21. Does “NAME” continue working to provide sufficient household income or to increase retirements pension entitlements in the future?</td>
</tr>
<tr>
<td>• To provide sufficient household income                       1</td>
</tr>
<tr>
<td>• To increase retirement pension entitlements                   2</td>
</tr>
<tr>
<td>• Other reason (specify) (HOC21_a) ___________________________ 996 I_</td>
</tr>
<tr>
<td>• Does not know                                                  997 I_</td>
</tr>
<tr>
<td>• Does not answer                                                 998 I_</td>
</tr>
</tbody>
</table>
Because there are basically two reasons, the surveyor might have some difficulties in distinguishing the two reasons to be explained to the interviewees.

The first modality “To earn more” includes all situations in which the choice was taken mainly for increasing the current wage. In other terms, the interviewee is more inclined to privilege a short-period perspective or an immediate profit of the investment made (that is, the prolongation of the activity).

The second modality “To have a higher pension in the future” includes all situations where the decision was taken to benefit from its effects on a longer period. Hence, the purpose here is not to increase the sum received on a short term but to mature the right to benefit from a higher pension when retiring.

If the interviewee has some difficulties in identifying the main reasons among the two proposed, the surveyor must privilege the answer modality “2”.

Should the interviewee state a reason that is not included among the answer modalities, the surveyor must codify “For some other reason” and enter the information acquired in the special field.

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5. Reduction of working hours in view of retirement

A further aspect to be examined regards the decrease in the working hours linked with the transition into retirement from work.

This aspect is surveyed on all targets of respondents.

To this purpose, question HOC22 provides for two distinct formulations: one to actual employed persons (formulation α) and one to non-employed persons (formulation β).
**Question HOC22. Reduction of working hours in view of retirement**

<table>
<thead>
<tr>
<th>HOC22.α</th>
<th>Has “NAME” reduced his or her working hours in a move to full retirement?</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOC22.β</td>
<td>Considering the last job, had “NAME” reduced the working hours in a move to full retirement?</td>
</tr>
<tr>
<td>• Yes</td>
<td>1 │</td>
</tr>
<tr>
<td>• No</td>
<td>2 │</td>
</tr>
<tr>
<td>• Does not know</td>
<td>997 │</td>
</tr>
<tr>
<td>• Does not answer</td>
<td>998 │</td>
</tr>
</tbody>
</table>

This question allows examining the share of workers who have done or are currently doing a **gradual transition** into retirement, in particular by reducing their working hours.

It is important that the interviewees must consider only the **reductions in working hours directly related to the retirement from work phase**.

For example, if a usual part-time worker decides to reduce his/her working hours based on factors other than for retiring, the interviewer must codify “NO”. On the other hand, if a usual part-time worker who is about to retire from work reduces his or her working hours, the interviewer must codify “YES”.

Moreover, interviewees must refer not only to the current job but also to their last job. **Even if the new job involves a reduced working hours**, during the final phase of the working career, then the correct codification will be “YES”.

All persons identified as gradually transiting into retirement by reducing their working hours are asked if such reduction occurred through benefiting from some economic bonus or within pensions schemes provided by national laws.

**Question HOC23. Facilitation for reducing working hours in view of retirement**

<table>
<thead>
<tr>
<th>HOC23</th>
<th>Has “NAME” reduced his or her working hours benefiting of some advantageous economic facilitation?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Yes</td>
<td>1 │</td>
</tr>
<tr>
<td>• No</td>
<td>2 │</td>
</tr>
<tr>
<td>• Does not know</td>
<td>997 │</td>
</tr>
<tr>
<td>• Does not answer</td>
<td>998 │</td>
</tr>
</tbody>
</table>
Since the surveyor might have some difficulty in explaining the concept of “economically advantageous facilitation” to the interviewee, an on-line help has been provided to this purpose:

All persons who have benefited from any kind of facilitation for reducing their working hours in view of retiring must answer “Yes”.

Such an example is the possibility given for older public servants to reduce their hours worked in favour of a reduction in wage proportionally inferior (e.g. 50%-reduction in working hours for a 25%-reduction in wage).

For employees in the private sector, such facilitation might be some advantageous economic agreement reached with the employer”.

It is important for the interviewer to bear in mind that all types of facilitation are to be considered. A facilitation is not only a money bonus 

*tout court*, but could be some advantageous economic agreement for the worker. In the case of public servants mentioned in the on-line help, for example, there is no clear benefit but rather a proportional benefit, though with a wage level inferior due to the reduction in working hours. Another example could be that the worker, in agreement with the employer, no longer works the non-paid overtime working hours usually worked, thereby reducing the actual hours worked for the same wage.

Interviewees who answer negatively to question HOC22, and, therefore, do not answer question HOC23, are asked whether, in the following five years, they intend on reducing their working hours.

Since the target of respondents is the same as that of question HOC22, question HOC24 provides also for a **double formulation** according to the interviewee’s professional status.
The codification criteria of HOC24 provide that the answer modality “2” includes all persons who do not plan to reduce their working hours in the next 5 years due to impossibility of practical implementation, that is, for reasons external to the interviewee’s desires. The answer modality “3” includes mainly situations that involve seasonal, occasional and precarious activities where the priority is to gradually leave the market. It also must include situations of imminent conclusion of the working activities and unemployment.

### Question HOC24. Planned reduction of working hours in the 5 years

<table>
<thead>
<tr>
<th>HOC24.α</th>
<th>Does “NAME” intend on reducing working hours within the next 5 years in a move to full retirement?</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOC24.β</td>
<td>If resuming a working activity within the next 5 years and in a move to full retirement, does “NAME” intend on working less hours than in the past?</td>
</tr>
</tbody>
</table>

- Yes 1
- No 2
- No planning/not interested 3
- Does not know 997
- Does not answer 998

This section examines the work activity-related factors able to influence the decision to postpone the withdrawal from the labour market. In particular, the questions help determine whether an improvement in the main aspects inherent to the working activities could contribute in deciding to prolong the working career. The concept of “contribution of single factor” might just be the most delicate to be transmitted to the interviewees. The interviewer must indeed explain that, at a single level, none of the factors examined could be decisive for delaying retirement. However, the purpose of the
module is to survey even the partial contribution each factor brings to the dichotomised decision to continue/stop working.

The aspects able to determine a better quality of work analysed are: hour flexibility, opportunity of a constant professional updating, a better work environment in terms of health and safety.

The final question to this section indeed regards the role of money incentives, or net increases in the wage levels.

Questions from HOC25 to HOC28 are addressed to all components of the reference target. The interviewer must obtain such information not only from persons potentially able to delay retirement but also to those who have already concluded their working career.

A script that must necessarily be read to the interviewees introduces the topic and purposes of the section.

**Script HOC2 (to be necessarily be read)**

*Let us examine now some factors that could influence the decision to prolong your working activity. Please tell me, in your case, whether the following factors could have influenced/could influence your decision to continue working instead of retiring.*

The first aspect regards the possibility of resorting to more elastic working hours.

<table>
<thead>
<tr>
<th>Question HOC25. Higher flexibility of working hours</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HOC25.</strong> According to “NAME”, could more flexible working hours have delayed/delay the decision to retire?</td>
</tr>
<tr>
<td>• Yes, even if only partially 1 □</td>
</tr>
<tr>
<td>• No 2 □</td>
</tr>
<tr>
<td>• Does not know 997 □</td>
</tr>
<tr>
<td>• Does not answer 998 □</td>
</tr>
</tbody>
</table>

The surveyor must consider the actual condition of the respondent, asking the question in the present verb if the interviewee is still active or in the past verb if he or she has already concluded the working career.
The aspect of partial contribution each factor could bring can again be underlined. This means that the surveyor must explain to the interviewee that the answer modality “1” includes “even if partially”.

The formulation “more flexible working hours” includes the traditional part-time working hours, when determining a reduction in hours worked compared to the hours previously worked. In such case, the correct codification will be “Yes, even if only partially”. Likewise, the formulation includes variable working hours and home work, which must consequently be included in answer modality “1”.

The second working aspect to be considered regards the professional updating activities. It is indeed important to take into account that the target of respondents includes persons aged 50 and over, for whom the problem of obsolete professional competences and opportunities of re-qualification might be crucial.

<table>
<thead>
<tr>
<th>Question HOC26.</th>
<th>Higher possibilities of professional updating</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOC26.</td>
<td>And a more frequent professional updating?</td>
</tr>
<tr>
<td></td>
<td>• Yes, even if only partially 1 □</td>
</tr>
<tr>
<td></td>
<td>• No 2 □</td>
</tr>
<tr>
<td></td>
<td>• Does not know 997 □</td>
</tr>
<tr>
<td></td>
<td>• Does not answer 998 □</td>
</tr>
</tbody>
</table>

The interviewer must evaluate whether it is necessary to complete the question, asking “could have delayed/delay the decision to retire?”

If the question is asked in its complete formulation, the surveyor, just as for HOC25, must take into account the actual condition of the interviewee, asking the question using the present verb if the person is still active and using the past verb otherwise.

The aspect of partial contribution each factor could bring can again be underlined. This means that the surveyor must explain to the interviewee that the answer modality “1” includes “even if partially”.

The third aspect examined refers to the health and safety precautions at the workplace.
Question HOC27. More health and safety precautions

HOC27. And a healthier and safer work environment?

- Yes, even if only partially 1
- No 2
- Does not know 997
- Does not answer 998

The interviewer must evaluate whether it is necessary to complete the question, asking “could have delayed/delay the decision to retire?”

If the question is asked in its complete formulation, the surveyor, just as for HOC25, must take into account the actual condition of the interviewee, asking the question using the present verb if the person is still active and using the past verb otherwise.

The aspect of partial contribution each factor could bring can again be underlined. This means that the surveyor must explain to the interviewee that the answer modality “1” includes “even if partially”.

The question “Healthier and safer work environment” includes both a change in one’s own tasks within the same workplace and/or company, as well as a complete change of job.

The last factor considered, that is net wage increases, somehow differs from the previous ones because it is less closely linked with the work environment.

Question HOC28. Wage raises

HOC28. And a financial incentive (e.g. bonus)?

- Yes, even if only partially 1
- No 2
- Does not know 997
- Does not answer 998

The interviewer must evaluate whether it is necessary to complete the question, asking “could have delayed/delay the decision to retire?”

If the question is asked in its complete formulation, the surveyor, just as for HOC25, must take into account the actual condition of the interviewee, asking the question using the present verb if the person is still active and using the past verb otherwise.
The aspect of partial contribution each factor could bring can again be underlined. This means that the surveyor must explain to the interviewee that the answer modality “1” includes “even if partially”.

The ad hoc module, as regards respondents currently employed, ends with question HOC28.

7 Identification of persons who receive an allowance

The last question of the module serves the purpose of completing the set of information drawn from HOC2 regarding the financial aspects. While HOC2 identified persons who received a pension, HOC29 intends identifying all persons who receive an individual allowance.

It is not addressed to all components of the reference target. Employees surveyed at question HOC28 are directly addressed to the next section I of the electronic questionnaire.

| HOC29. Does “NAME” benefit from an individual allowance? Do not consider the unemployment allowance |
|-----------------------------------------------------|------------------|
| Attendance allowance | 1 □□ |
| Invalid allowance, mobility allowance | 2 □□ |
| Other type of allowance (specify) (HOC29_a) | 3 □□ |
| No | 4 □□ |
| Does no know | 997 □□ |
| Does not answer | 998 □□ |

The interviewer must read the different answer modalities since the respondent can give more than one answer. The first three modalities imply a positive answer.

Because the surveyor might have some difficulty in clearly explaining the concept of “individual allowance” to the interviewee, an on-line help has been provided:

“The purpose is to survey whether the person benefits from any “individual” allowance or annuity. All types of pension are, thus, to be excluded.
The invalidity allowance and mobility allowance are linked with the early withdrawal from work. Usually, they are assigned in cases of reduced ability to work due to an illness or injury, or in cases of activity closing down/reducing for economic reasons. They no longer are assigned when reaching the age established for retirement.

In case the interviewee receives an allowance that is not among the answer modalities, the surveyor must codify “Other type of allowance” and enter the information acquired in the special field.

After question HOC29, which ends the ad hoc module, the target of respondents continues the interview with the next section I of the electronic questionnaire.