

**INSTRUCTION**

for filling in the questionnaire “Transition from work to retirement” – ad hoc  
module to the Labour Force Survey

## I. BASIC TERMS

According to the Regulation №249/2011 of the European Commission an ad hoc module “Transition from work to retirement” is included in the Labour Force Survey. The purpose is to obtain information on the effect of the reforms conducted in the sphere of retirement policy and to create basis for future political decisions in the field.

In particular, the module aims is to ensure information on the following questions:

- how and why people leave the labour market;
- for those who have leaved the labour market – reasons for not staying longer at work;
- for those who are at the labour market – how long do they expect to stay.

Subject of the ad hoc module “Transition from work to retirement” are persons aged 50 to 69 years of age who work or who have worked after completion of 50 years of age.

Interviewing is done with a supplementary questionnaire at the Labour Force Survey.

Interviewed are households that are into the LFS sample for the third time, i.e. persons for which the Individual questionnaire – Version 1 is filled in.

## II. DEFINING PERSONS WHO HAVE TO BE INTERVIEWED WITH THE ADDITIONAL QUESTIONNAIRE “TRANSITION FROM WORK TO RETIREMENT”

Questionnaire “Transition from work to retirement” is filled in after completing the LFS questionnaire – Individual questionnaire – Version 1. Only persons interviewed with the core LFS questionnaire are interviewed with the additional questionnaire.

**Persons who have to be interviewed with the additional questionnaire are defined based on filter questions, included at the end of Individual questionnaire – Version 1.**

**Question AM1** concerns the person age:

- In case the persons is born **between 1943 and 1961** code 1 is marked and question AM2 concerning the employment status is asked next;
- In case the persons is born prior to 1942 г. (i.e. in 1941 or earlier) or after 1962 (i.e. in 1963 or later), code 6 is marked and the interview terminates;
- In case the persons is born in 1942 it is necessary to indicate whether the person birthday is prior or coincides with the last day of the reference period (code 2) or is after this date (code 3). If code 2 is marked i.e. the person has completed 70 years the interview terminates and the module questionnaire is not filled in. In case code 3 is marked, i.e. the person has not completed 70 years, question AM2 concerning the employment status is asked next;
- In case the persons is born in 1962 it is necessary to indicate whether the person birthday is prior or coincides with the last day of the reference period (code 4) or is after this date (code 5). If case code 4 is marked, i.e. the person has completed 50 years question AM2

concerning the employment status is asked next. In case code 5 is marked, i.e. the person has not completed 50 years, the interview terminates and the module questionnaire is not filled in.

**Question AM2 is filter question concerning the person employment status.** One of the following codes has to be marked according to the answers:

- Code 1 – if the interviewed person works or has a job during the reference period, i.e. answer “Yes” – code 1 is given to at least one of the questions 2, 3a, 3b, 4 or 5.

*Persons at supplementary maternity leave for bringing up children up to 2 years of age during the reference period (question 6=8) are not considered employed for the module purposes, as well as persons who did not work during the reference period, but have a seasonal job (question 6=12). Code 2 is marked for these persons.*

- Code - if the interviewed person does not work during the reference period, but has worked in the past (answer “Yes” – code 1 is given to question 46).
- Code – if the person has never worked.

In case code 1 is marked to question AM2, the person has to be interviewed with the module questionnaire “Transition from work to retirement”.

In case code 2 is marked to question AM2, the condition given in question AM3 has to be checked also.

In case code 3 is marked to question AM2, the person is not subject of survey and the interview terminates.

**Question AM3 is filter question on (the approximate) age of person at leaving the last job** (*age of the person at his/her last work*).

The purpose is to identify persons who did not work during the reference period, but have a previous job which they leave after completion of 50 years of age.

The interviewer has to calculate the difference between **the year of leaving of the last job (year when the person worked for last), pointed to question 47a and the year of birth. These are recorded into the household questionnaire and the Individual questionnaire – Version 1 and have to be rewrite into the respective fields to the question AM3.** The difference corresponds to the approximate person age when he/she has leaved his/her last job (worked for last). **If the difference is larger or equal to 50 years, the module questions are asked.** If the difference is 49 years or smaller, i.e. the person has not work after 50 years of age, the module questions are not asked and the interview terminates.

## II. FILLING IN THE QUESTIONNAIRE “TRANSITION FROM WORK TO RETIREMENT”

The identification part of questionnaire “Transition from work to retirement” – district, number of cluster within the district, number of household within the cluster should strictly correspond to the identification part of the household questionnaire.

**Question M1.** The serial number of person for whom the data refer is to be recorded into the respective questionnaire column. The number should be the same, used for that person in the list of household members (**question №2 of part I „Household data” in the household questionnaire**), as well as the number recorded into the LFS individual questionnaire.

Information on the ad hoc module is received directly from the persons concerned or from another household member who can present it.

In case the person is interviewed with the core LFS questionnaire, but cannot be interviewed with the ad hoc module “Transition from work to retirement”, the respective reason should be recorded in question №M20.

Questions marked with ☺ concern the interviewer. These questions should not be red to the interviewed persons, but filled in by the interviewer according to the respective instructions.

**Question M2.** Old-age pensions could be from the statutory scheme and from private pension funds, compulsory or voluntary, received from the country or from abroad. The following are included:

- old-age pensions granted at completion of the standard retirement age;
- early pensions, granted before the standard retirement age due to unfavourable working conditions (first and second labour category);
- early pensions granted to teachers before the standard retirement age; old-age pensions of military personnel, public servants working under the Law on Ministry of Interior, examining magistrates and others;
- personal pensions – pensions granted by the Council of Ministers to persons not answering to the Labour Code requirements.

**More detailed instructions on the old-age pensions are pointed in questions M7.1 and M7.2.**

- pensions paid by private pension funds under occupational schemes (see instructions to questions M4.2 and M7.2);
- supplementary pensions paid by the private pension funds under voluntary social security (see instructions to questions M4.3 and M7.3).

Survivor’s pensions, disability pensions, social assistance benefits, family allowances, and similar as well as payments in kind are not included here.

*In case the reason for leaving the last job, pointed in question 51 of the core questionnaire is retirement (code 08) it is logical the answer to question M2 to be “Yes”. In case the answer to question 74 (main labour status during the reference period) is pensioner (code 4) it is logical the answer to question M2 also to be “Yes”.*

**Question M3.** Concerns persons not receiving old-age pension. The purpose is to gather information whether the person is ensured for pension. Answer “Yes” is marked if:

- at the moment the interviewed person is ensured for pension (him/herself, by employer or another insurer) no matter the type of pension fund or scheme and despite that the age, length of insurance and the other conditions for receiving pension might not be fulfilled;
- at the moment the interviewed person is not ensured for pension, but **a period of insurance exists;**

- the person **has already reached eligibility for an old-age pension** (but did not retired).

*Answer “Yes” to question M3 is certainly expected if the person does not receive old-age pension and:*

- *works under labour contract or civil servants contract (question 11=1 or 2); or*
- *his/her last job is in the public sector (question 48 = 4).*

**Question M4. Consists of three separate sub-questions (M4.1 to M4.3) concerning the different types of pension funds, where the contributions are paid.** Answer 1 („Yes”) or 2 („No”) is marked for each sub-question.

**Question M4.1 concerns the obligatory pension insurance, which means that for most of the interviewed persons the answer has to be “Yes”.**

Question M4.1 concerns the contributions to the State Social Security Fund and to the supplementary compulsory pension insurance at Universal Pension Fund. The aim of universal pension funds is to ensure supplementary income through granting of supplementary old-age pension (in case of eligibility to old-age pension from the State Social Security Fund). The universal pension funds cover all persons born after 31.12.1959 (ensured also through the State Social Security Fund).

**Question M4.2. Refer to the compulsory insurance at occupational pension funds and voluntary insurance under occupational schemes.**

Persons working at unfavorable working conditions (first and second labour category) are compulsory ensured at **occupational pension funds** and the ensured persons are choosing the fund themselves. Social insurance contributions are paid by the employer. Periodic pension will be paid through the occupational funds for the period between the early retirement (first or second labour category) and reaching eligibility to an old-age pension i.e. completion of 60 years of age for female and 63 years for males and length of insurance 34 years.

*First labour category covers: persons working under the ground; pilots, air hostess and other employed at aeronautics; persons working at nuclear plants; persons working at metallurgy; divers, crew of shipping carrying chemicals, petroleum and coal; engine-drivers of maritime fleet vessels, etc.*

*Seconds labour category covers: city-bus drivers in cities with more than 300 thousand inhabitants; drivers of vehicles with loading capacity over 12 tons; locomotive drivers; miners at open mines; persons working in ionizing radiation environment; persons working at solid fuel heating plants; persons working at weaving workshops; some workers at chemistry, metallurgy, shipbuilding, glass production; brass band musicians, circus performers and others.*

Answer “Yes” is marked also for teachers and similar, who insure themselves at the Teachers Pension Fund. Employers pay the contributions to the Teachers Pension Fund. .

**Occupational schemes regulate the supplementary voluntary pension insurance, agreed by an enterprise-insurer and its employees (according to the law) and put in writing in a collective agreement or collective labour contract between them.**

Each person, aged 16 and more could participate in an occupational scheme organized by his/her employer-insurer.

Persons entitled to participation in an occupational scheme obligatory are defined at the collective labour contract or at the collective agreement.

Supplementary insurance at voluntary pension funds by occupational schemes leads to eligibility for periodic personal old-age pension – at completion of 60 years of age for female and male (lump sum or installment payments of the resources accumulated by the ensured persons or its survivors).

*In case answer “Yes” is marked to question 4.2, the answer to question 4.1 should be also “Yes”.*

**Question M4.3** concerns the funds for supplementary voluntary pension insurance. Each person aged 16 and more could insure his/herself or to be insured at supplementary voluntary pension funds.

Contributions to a voluntary pension fund might be paid by the employer as an insurer, by another insurer or by the person him/her self. The supplementary voluntary pension insurance is individual and each insured person has an individual insurance number and an individual account.

Insurance at a voluntary pension fund leads to eligibility for personal old-age and disability pension - Осигуряването в доброволен пенсионен фонд дава право за получаване на лична пенсия за старост и инвалидност – for life or periodic, as well as survivors pension, received by the survivors of a dead insured person.

**Question M5** concerns all persons not receiving old-age pension or pension not connected to the employment and the aim is to gather information whether the person receives any other pension. It consists of three sub-questions, corresponding to different pension types. The respective code 1 (“Yes”) or 2 (“No”) is marked for each sub-question.

**Question M5.1 Disability pension.** Disability pension is paid to persons having 50 or over 50 per cent reduced working capacity. Disability pension is granted for the period of disability and for persons at and over standard retirement age – for life.

Disability pensions are as follows:

- **disability pension for general disease** – entitled to such pension are persons who have lose their working capacity and have required by the law length of insurance. Persons disabled by birth and those who became disabled before starting of a job, are entitled to such pension if they have one year length of insurance;
- **disability pension for work accident or occupational disease** – insured persons with 50 or over 50 per cent reduced working capacity due to work accident or occupational disease are entitled to disability pension for work accident or occupational disease, no matter the length of insurance;
- **military disability pension** – entitled to such pension are persons who have lose their working capacity due to disease or who are injured during or in connection to the military service, as well as persons injured in assisting the armed forces;
- **civic disability pension** – entitled to such pension are persons who have lose their working capacity due to disease or who are injured in fulfillment civic duties or who are injured incidentally during the performance of official duties by the authorities;

- **social disability pension** – is granted to persons 16 years and over and with reduced working capacity of 71 per cent and more;

- **disability pension, paid by a supplementary voluntary pension fund.**

Monthly allowances for social integration of disabled persons, target support and payments in kind are not included into disability pensions.

**Question M5.2 Survivors pension.** Individual pensions may pass in survivor's pensions, excluding the civic disability pensions, social disability pensions, special merits pensions and personal pensions.

The spouse of a deceased person, as well as his/her children and parents, may receive survivors pension 5 years before the standard retirement age or earlier if he/she is incapable to work.

Survivor's pension may be granted by supplementary voluntary pension fund also.

### **Question M5.3. Other pensions**

The interviewer have to record in details the type of pension defined as "other" and if it corresponds to any of pensions listed in questions M5.1 or M5.2 to mark the respective answer. If the description corresponds to an old-age pension (according to the instructions to question M2), the answer to the last have to be corrected and the respective type of pension to be marked in question M7.

In the extreme case, if information is available that the person receives a pension, but the type of pension is unknown, the answer "Yes" to question M5.3 is marked.

**If at least one of the answers to questions M5.1 to M5.3 is „Yes”, i.e. the person receives any kind of pension, the filter question M11 is asked next.**

**If all answers are “No” (i.e. the person does not receive pension), the next question M6 is asked.**

**Question M6.** Concerns persons not receiving pension, but possibly will be entitled to old-age pension in the future. For persons who as an exception did not insured themselves and would not be able to gain such rights (i.e. answer "No" to question M3 is marked), the interviewer has to mark code 6 to question M6, possibly without asking the question.

The question purpose is to obtain information on the persons expectations (at the moment of interview) to stay at the labour market, i.e. to continue working or to search work after receiving a pension. If the person declares intension to work or to search work after the retirement, the reason has to be specified - financial (to provide sufficient personal or household income or to increase the pension size) – code 1, or other (satisfaction with the job, social contacts, convenient working time) – code 2. If the persons, due to any reason, intends to leave the work even before receiving an old-age pension, code 4 is marked.

**Question M6.A is a filter question.** The aim is to distinguish working and not working persons amongst those who do not receive pension. The filter question AM2 at the end of Individual questionnaire – Version 1 could be used for the purpose. If the person is employed during the reference period, i.e. AM2=1, question M6.B should be answered. If the person is unemployed, i.e. AM2=2, the interview terminates and the interviewer has to fill in question M19 on duration of interview only.

**Question M6.B.** Concerns employed persons not receiving a pension. The purpose is to find out whether the transition to full retirement is done gradually, through reducing working hours. Answer “Yes” refers to persons who have reduced their working hours before receiving the first old-age pension based on personal choice, with to spend more time with relatives, preparation for retirement or giving up the business. Reduction of working hours could be expressed also by reduction or refusal of extra hours worked or by stopping the second work.

If the working time has been reduced due to health reasons, care for child or adult family member, as well as if the working time is reduced by the employer, answer “No” is marked.

**Question M7.** The question concerns only persons receiving old-age pension, i.e. answer “Yes” (code 1) is marked to question M2. There are three sub-questions, which have to be read to the interviewed person and the respective answer “Yes” (code 1) or “No” (code 2) to marked.

**Question M7.1.** The compulsory old-age pension is paid by the State Social Security Fund. The following are included:

- **old-age pensions paid at completion of the standard retirement age.** Entitled to old-age pension are female at completion of 60 years of age and male at completion of 63 years of age and length of insurance 34 years and 4 months for female and 37 years and 4 months for male. Insured persons who do not meet these criteria are entitled to pension at completion of 65 years for female and male and no less than 15 years real length of insurance;

- **early pensions paid before the standard retirement age due to work at unfavourable working conditions (first an second labour category)** – persons who have worked under the ground, water, in air, some construction workers and some driver categories. Insured persons with at least 10 years length of insurance at first labour category might retire at completion of 52 years for male and 47 years for female (in case the sum of the age and the length of insurance is at least 100 for male and 94 for female). Similar, the insured persons with at least 15 years length of insurance at second labour category might retire at completion of 57 years of age for male and 52 year for female (in case the sum of the age and the length of insurance is at least 100 for male and 94 for female);

- pensions paid, **no matter the age at presence of 25 years and 4 months** length of insurance to: active military personnel with 2/3 real service under the Law on Defense and Armed Forces of the Republic of Bulgaria; civil servants under the Law on the Ministry of Interior and the Law on Execution of Penalties and Detaining, civil servants under the Law on Post Services, article 11, civil servants engaged with protection the juridical authority according to Law on Jurisdiction, article 391, examining magistrates – in the presence of 2/3 real service under the listed laws; civil servants at the State Agency “National Security”, servants at the General Directorate “Fire Security and Protection of Population” at the Ministry of Interior, executing some of the activities according to the Law on Ministry of Interior, article 52d, Para 2, p. 8 and 9 in the presence of 2/3 real service within the system of protection of population;

- pension paid no matter the age in the presence of 15 years length of insurance to: pilots, parachute jumpers, crew of submarine; divers at the General Directorate “Fire Security and Protection of Population” at the Ministry of Interior;

- pensions of ballet dancers and dancers, granted at termination of the labour contract no matter the age and in the presence of 25 years length of insurance at the post of ballet dancer or dancer at cultural organization;

- personal pensions granted by the Council of Ministers in case some of the requirements of the Social Insurance Code do not exist.

**Question M7.2.** Answer “Yes” (code 1) is marked **only** for persons receiving pensions from **Teachers Occupational Pension Fund or from private fund according to occupational scheme.**

**Teachers** are entitled to an old-age pension at completion of 57 years of age for female and 60 years of age for male and in the presence of 25 years and 4 months for female and 30 years and 4 months for male. **Up to completion of the standard retirement age** (60 years for female and 63 for male) and in the presence of the required length of insurance (34 years and 4 months for female and 37 years and 4 months for male), but no later than completion of 65 years, pensions are paid by the Teachers Pension Fund.

**Pensions to the teachers fulfilling the standard retirement requirements** according to the Social Security Code (age - 60 years for female and 63 – for male and length of insurance 34 years and 4 months for female and 37 years and 4 months for male) are paid by **the State Social Security** and answer “Yes” (code 1) to question M7.1 and answer “No” (code 2) to question M7.2 is marked for them. .

**To question 7.2 are included also pensions from supplementary voluntary pension insurance under occupational schemes** at private fund. (See instructions to question M4.2, concerning the occupational schemes for supplementary voluntary pension insurance). The supplementary voluntary insurance at voluntary pension funds under occupational schemes gives a right to a periodic old-age pension – at completion of 60 years for female and male (lump-sum or by installment payments).

According to the conditions of the occupational scheme, agreed in the collective labour agreement (collective labour contract), the fund might pay the pension up to 5 years before completion of 60 years of age.

**Question M7.3.** Answer “Yes” (code 1) is marked only for persons receiving pension from a supplementary voluntary pension insurance fund (See instructions to question M4.3). At a will of the insured person, the fund for supplementary voluntary pension insurance might pay personal old-age pension at completion of the standard age required or up to 5 years before this age.

**Question M8.** The age is recorded (in completed years) at which the person started to receive any old-age pension (out of the listed in question M7). See instruction to questions M7.1, M7.2 and M7.3 in respect the retirement age for different labour categories.

**Question M9.** Concerns the persons only, receiving any old-age pension. The purpose is to find out whether in addition to the old-age pension the persons receives (at the reference period) any other type of pension, no matter from Bulgaria or abroad and no matter full size or reduced size pension. There are three sub-questions to this question, which have to be read to the respondent and for each of them the respective answer to be marked – “Yes” (code1) and “No” (code 2). **More detailed instructions are given to questions M5.1, M5.2 and M5.3.**

**Question M9.1.** Disability pensions include disability due to:

- work accident and occupational disease;
- military disability;

- civil disability;
- social pension for disability.

**Question M9.2.** Only survivor's pensions are considered, **excluding supplements to the pension of a deceased spouse**. Survivor's pensions that might be received together with old-age pension areas follows:

- survivor pension for disability due to work accident and occupational disease;
- survivor pension for military disability;
- pensions granted to the parents of persons deceased during the compulsory military service;
- survivor's pension granted by fund for supplementary voluntary pension insurance.

**Question M9.3.** Answer „Yes” (code 1) is marked if the person receives pension different from the pointed in questions M9.1 and M9.2. The interviewer have to record in details the type of “other” pension received and if it corresponds to one of the pensions listed in questions M9.1 and M9.2, to mark the respective answer. If the description corresponds to old-age pension it has to be reflected to questions M7.1, M7.2 or M7.3.

In case information is received that the persons receives a pension, but the type is unknown, answer “Yes” to question M9.3 is marked.

**Question M10.** Concerns persons receiving an old-age pension. The purpose is to find out whether the person has received any of the listed disability pensions before reaching eligibility for an old-age pension for the respective category. For instance, a person might receive a civil disability pension until reaching eligibility for an old-age pension.

**Question M11. Filter question.** The question purpose is to distinguish employed and unemployed persons during the reference period, as they are answering different questions. Definition of the employment status is based on the answers in the Individual questionnaire – Version 1.

Code 1 is marked for persons who have worked during the reference period – at least on of the answers to questions 2, 3a, 3b, 4 or 5 is “Yes” - 1, (excluding persons at supplementary maternity leave – q. 6=8 and persons who did not work during the reference period, but have a seasonal job – q. 6=12). Question M15 is asked next. Code 1 also corresponds to answer 1 to the filter question AM2 at the end of questionnaire.

Code 2 is marked for persons who do not work, but search a job, i.e. answer “Yes” – 1 is pointed to question 53. The interview for these persons terminates and the interviewer has to record the duration of interview to question M19.

Code 3 is marked for persons who do not work and do not search a job, i.e. answer “No” – 2 is pointed to question 53. Question M12 is asked next.

**Question M12.** Concerns persons who receive pension and do not work during the reference period. The main reason for not staying longer at work is recorded.

Code 1 is marked in cases connected to more favourable financial conditions at leaving the job, for instance benefit paid by the employer, lump-sum payment received at retirement.

This code is also marked if the person has fears that postponement of the retirement might result in lower pension due to possible pension reform.

Code 2 is marked if the person is dismissed, in case of shortage of personnel, end of temporary or seasonal job and no other job could be found.

Code 3 concerns persons who have completed the provided into the legislation age and who cannot stay at the respective position any more.

Code 4 is marked if the person has reached eligibility for retirement (the age required and/or length of insurance) and has leaved job, no matter by own will or not.

Code 5 concerns cases when the persons is not satisfied with the working conditions – for instance, inconvenient working time, obligations, unhealthy or dangerous working conditions, tension and stress, insufficient or inappropriate qualification, bad relationships with the employer or colleagues, etc.

Code 6 is marked if the reason for leaving is bad health or disability of interviewed person.

Code 7 is marked in case of family reasons, incl. care for children or other relatives; given up the business and others.

Code 8 is marked in case the reason cannot be referred to any of the listed.

Only one reason is pointed in question M12. If the person cannot define the main one, the one with the lower code is pointed.

**Question M13.** The aim of the question is to find out whether at the moment of leaving the last job the persons wished to stay longer at work. Persons are asked who receive a pension (no matter old-age or another pension) and who do not work and do not search a job.

If the persons answers “I would want to work, but only if a possibility exists to change the position/working place”, code 1 “Yes” should be marked.

**Question M14.** Persons are asked who receive a pension (no matter old-age or another pension) and who do not work and do not search a job.

The purpose is to find out whether before of after retirement due to old age and length of insurance the persons has reduced his/her working time by own will.

Answer “Yes” (code 1 or code2) is to be marked in case the person has work reduced hours before or after the retirement, due to personal interest, wish to spent more time with the family, wish to stop work gradually, etc. Reduction of working time might be expressed also in reduction or removal of extra hours worked. Code 1 or code 2 has to be marked also for self-employed persons who have reduced their working hours as a transition to retirement.

Code 2 is marked for persons who left work at reaching eligibility for an old-age pension and started new part-time job.

Code 1 is marked if the person has reduced his/her working time once before the retirement and twice, since or after the retirement and in case the reason for the first reduction of working time is connected to the retirement.

Code 3 – “No” is marked for persons who worked part-time before the retirement and if the number of working hours is not reduced additionally before or after the retirement.

Code 3 (“No”) is marked for persons who have been pressed to reduce their working time (before or after the retirement) due to the employer reasons or due to care for children or adult family members. Code 3 is marked also in case of an answer like “It was impossible to reduce the working hours”.

After answering to question M14, no matter the answer, the interview terminates. Question M19 concerning the interviewer is the next.

**Question M15.** All working persons receiving a pension are asked this question.

The purpose is to find out the main reason for staying at work no matter the pension received.

Code 1 is marked in case the person works mainly due to financial reasons, i.e. to provide higher income or to increase his/her pension. This code is marked also in case the person receives any pension, survivor’s for example, but have to work in order to reaches eligibility for a personal old-age pension.

Code 2 is marked in case the reason is non-financial, satisfaction with the job for example; flexible working time; opportunity for development; opportunity for social contacts; job prestige; favourable working conditions answering to the health and safety requirements, etc. Also the following are included here: “Don’t want to stay at home”, “Don’t know how to spend free time if do not work”, “The children have left the home”, “Spouse is still working”, Cannot find somebody to carry out my business”.

If the person is a pensioner, but has accidentally worked during the reference week, the reason to work during this week is asked.

If the respondent hesitates between the two reasons, the more important has to be pointed. In case both reasons are important, the reason with the lower code is marked, i.e. “financial reason”.

In case code 1 is marked to question M15, question M16 is asked next. If code 2 is marked to the same question, question M17 is asked next.

**Question M16.** The purpose is to find out the main financial reason for staying at work.

Only answers with codes 1 and 2 are read to the respondent. Code 3 is marked by the interviewer if the respondent gives one and the same importance to the current (code 2) and the future income (code 1) or if he/she hesitates and cannot decide which of the pointed financial reasons is more important.

**Question M17.** The question is similar to question M14, but is asked to persons who work and receive a pension.

The purpose is to find out whether the person working time has been reduced after the retirement.

Answer “Yes” (code 1) is marked in case the person who has worked full time is working part time after the retirement. The reduction of working time might be expressed by decrease or removing of supplementary (extra) hours worked or by stoppage of the second (additional) job. Code 1 has to be marked also for self-employed persons working less hours after their retirement.

Code 2 – “No’ has to be marked for persons who have worked part-time before their retirement and whose working time has not been reduced additionally after their retirement.

**Question M18.** The question purpose is to find out in what time the person intends/plans completely to stop work and to search work.

Code 5 – “More than 10 years” is marked for persons who answer “I will (have to) work forever”.

Code 6 – “Cannot answer” is marked for persons who have not plans to stop work or have not decided when will stop work.

After answering question M18 the interview terminates and the interviewer goes to question M19.

**Question M19.** The interviewer records the duration of interview **only on the ad hoc module “Transition from work to retirement”** in minutes.

After completion of the interview the interviewer has to record at the place provided at the beginning of the module (immediately after the identification part) whether the person is interviewed on the ad hoc module or not. Persons who have to be interviewed on the ad hoc module (defined by questions AM1, AM2 and AM3 of the Individual questionnaire – Version 1), but are not - are considered non-interviewed. Nothing is recorded for persons who are not subject of survey, as well as in case no information is received on the person on the core questionnaire.

For persons who are not interviewed on the ad hoc module, the interviewer has to record in **question M20** the respective reason.