

**multilinks**

## Database on Intergenerational Policy Indicators

# Methodological Report

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For updates please visit <http://multilinks-database.wzb.eu/>

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## Acknowledgements

Collecting data on the social policies of a wide range of countries remains a difficult task even though European integration has fostered efforts to make information on policies and their outcomes more transparent and more comparable. For many policy issues, such as long-term care, comparative data collection and research are still in their early stages. Existing comparative data sources often do not encompass all of the countries in our study, which include all 27 European Union (EU) member states as well as Georgia, Norway and Russia. There is insufficient data in particular for countries that joined the EU from 2003 onwards. Moreover, national statistics are not always complete, and language problems constitute a tremendous barrier to accessing them. We are therefore very grateful to national experts who agreed to help us in filling in gaps in the data, better interpreting the available data and finding our way across a wealth of information which is not always consistent across data sources. We are well aware that answering our questions was time-consuming and often required a willingness to go beyond one's own specific expertise, even recruiting other informants.

The following national experts collaborated with this Multilinks project:

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Information from the national experts was always taken into account when building the database. In citing the source of specific information, however, we mention the expert only when he or she is the main or only source of information.

Finally, we would like to express our great thanks to Ralf Schäfer, Niels Schenk, Arthur van Dam and Mathijs van Wingerden, who implemented the database and the Web application.

## Codes and Abbreviations

### Country codes

*Table 1: ISO 3166 alpha-2 country codes:*

<b>Country</b>	<b>Abbreviation</b>
Austria	AT
Belgium	BE
Bulgaria	BG
Cyprus	CY
Czech Republic	CZ
Denmark	DK
Estonia	EE
Finland	FI
France	FR
Georgia	GE
Germany	DE
Greece	GR
Hungary	HU
Ireland	IE
Italy	IT
Latvia	LV
Lithuania	LT
Luxembourg	LU
Malta	MT
Netherlands	NL
Norway	NO
Poland	PL
Portugal	PT
Romania	RO
Russia	RU
Slovakia	SK
Slovenia	SI
Spain	ES
Sweden	SE
United Kingdom	UK

### Abbreviations

EU-SILC	European Survey of Income and Living Conditions
GGs:	Generation and Gender Survey
ISCED:	International Standard Classification of Education
NACE:	Nomenclature statistique des activités économiques dans la Communauté européenne (The Statistical Classification of Economic Activities in the European Community)

## 1 A database on intergenerational policy indicators

The database is part of the Multilinks project ([www.multilinks-project.eu](http://www.multilinks-project.eu)), which is funded by the European Commission within the Seventh Framework Programme. The objective of the Multilinks project is to investigate how changing social contexts affect social integration, well-being and intergenerational solidarity across different European nations. Public policies are one dimension of the social contexts in which intergenerational relations are embedded. Thus, a prime objective of Multilinks is to describe European states' various approaches to defining, regulating, supporting and/or asserting responsibilities between generations.

The database on intergenerational policy indicators provides a set of indicators which describes social policies and legal frameworks in the 27 European Union (EU) member states as well as Georgia, Norway and Russia around the year 2004. The starting year was chosen as a reference point because around that time the first wave of the Generation and Gender Survey (GGS) was launched. Originally the database should provide context information for micro-data analyses with the GGS data. The database has been up-dated for the year 2009 which is the most recent year for which almost all indicators could be up-dated.

The conceptual framework for the collection and interpretation of indicators of the institutional framework of intergenerational obligations has been outlined in the first project report (Saraceno and Keck 2009). By building on Korpi's (2000), Leitner's (2003) and Saraceno's (2000; 2004) insights, we distinguish three basic types of public policies on the basis of how the responsibilities for intergenerational support are allocated between the state and the family (and through the latter also to the market).

1. *Familialism by default*, or unsupported familialism, in so far as there are no publicly provided alternatives to family care and financial support. This type can be implicit, but also explicit, as in the case of financial obligations within the generational chain and kinship networks that are prescribed by law.
2. *Supported familialism*, in so far as policies, usually through financial transfers (including tax relief and paid leaves), support families in keeping up their financial and caring responsibilities towards the younger and older generations.
3. *Defamilialisation*, in so far as the individualisation of social rights (e.g. with regard to minimum income provision, unemployment benefits for the young, entitlement to higher education or to receiving care) reduces family responsibilities and dependencies.

The structure of the database is based on this conceptual framework. It distinguishes upward and downward patterns of support and obligations, as well as between financial and caregiving obligations. Consequently, the database includes information on four domains:

- (a) responsibilities to care for children;
- (b) responsibilities to provide financial support for children;
- (c) responsibilities to care for frail older people;
- (d) responsibilities to provide financial support for older people.

Within each domain, we selected the policies or legal regulations which, according to our theoretical framework, are most relevant. In the case of responsibilities towards children, maternity and parental leaves, public childcare provision and financial support for families with children play a particularly important role. In the

case of responsibilities towards older people, we selected long-term care policies and pension policies which secure people in retirement age against financial hardship. We also included the existence of legal obligations to support either adult children or parents in case of need.

Collecting comparative indicators is a challenging task: concepts and definitions sometimes vary from country to country; indicators do not always refer to the same unit of measurement or point in time; often there are substantial regional variations within countries, which are blurred by the reporting of national averages; and different data sources frequently offer different, sometimes even contradictory, figures. This methodological report addresses all of these issues and explains and documents the solutions adopted in each case.

The next section presents the conceptual framework of the database and brief instructions on how to use the database. Section 3 deals with methodological problems both at the country level and in cross-country comparisons, focusing especially on the latter. The fourth and final sections comprise detailed documentation of the indicators.

## 2 Conceptual framework of the database

In this section we describe the object of measurement as well as how we identify policy areas and connect them to different types of social policy approach. This conceptual framework has been used as a guideline to design and build the database.

### 2.1 *Measuring what?*

For a long time comparative welfare-state research was to a large extent empirically based on expenditure data. However, the use of expenditure data for the analysis of welfare-state expansion, retrenchment and, more generally, the mode (or regime) of welfare is only partially useful, as there is not a seamless overlapping of levels of expenditure and patterns of provision. This issue has been addressed methodologically as the ‘dependent variable problem’ (Clasen and Siegel 2007). Furthermore, at the level of patterns of provision, two distinct issues should be distinguished: one concerns cross-country or cross-time differences within entitled groups; the other concerns social policy implementation in a given field and with regard to a given objective. Even the crucial distinction between benefits in kind and benefits in cash appears in some cases to be too simplistic for the purposes of our theoretical perspective and research question. We need to know whether a policy programme relieves family members from part of their obligations or whether it supports them (in a more or less gendered way) in fulfilling their obligations.

For these reasons we did not start from expenditure data. We rather looked at modes of provision, on the one hand, and at criteria for entitlement, levels of coverage and benefit level, on the other. These characteristics are all output measures. We addressed neither the issue of coherence between policy measures and official policy goals nor prevalent attitudes and preferences (for the distinction between these

different levels in policy analysis, see Kaufmann (2002)). We also did not address the issues of quality or of outcomes.

There are very few clear and robust measures of quality available, even though demand for them is quite strong (see Atkinson 2005). What is good education or good care is often expressed in abstract terms, such as the number of staff dealing with the target group or the required level of qualification for the staff (e.g. OECD 2005b). We therefore decided to consider only coverage rates for the database. As for outcomes, this is precisely the research question that can be addressed through use of this database. In so doing, we share Korpi’s approach for developing his SCIP indicators on patterns of citizenship – that is, a focus on policies.

After having defined at what level policy measures are addressed, we next set out to find adequate and robust indicators which would allow us to distinguish the three types of public policies defined in the conceptual framework – defamilialisation, supported familialism and familialism by default. By definition, familialism by default refers to the absence of policy support and therefore is not defined as a positive indicator; it is, rather, residual – referring to everything which is left to the responsibility of the individual or family. The exceptions are legal obligations to provide support, usually of a financial nature. Here the state defines the duties of kin members and delineates the range and duration of intergenerational responsibilities within families. Obligations to provide support are in general regulated downward towards children and grandchildren and upward towards parents and grandparents, and in some countries even extend to second-degree relatives. The more comprehensive these obligations are, the more responsibilities are assigned to the family by law



and the higher is the degree of unsupported familialism.

Defamilialisation refers in the first instance to policies that partially relieve the family of their duties to provide hands-on care or financial support. The clearest expression of such policies in the area of care responsibilities is the publicly funded provision of non-family care, primarily through collective services. In addition, some forms of cash for care may be classed under this type of ‘defamilialising’ policy, such as when the cash benefits may be used to pay for formally employed providers only. But the status of these benefits is more uncertain and closer to supported familialism when their use can be freely determined, as they are then often integrated into the family budget (see Unger-son and Yeandly 2007). The Janus-faced character of such payments makes it difficult to determine whether a priori financial allowances targeted to care needs should be classed under defamilialisation or supported familialism. We use a heuristic evaluation to distinguish between these two kinds of measures. If cash-for-care allowances are restricted to service use, we categorise them as a measure of defamilialisation. If the allowances are not bound to service use, we interpret them as a measure of supported familialism. Of course, they may also be used to buy services in the formal or informal markets, but this choice is shaped by available family resources. Furthermore, we consider defamilialisation by means of the market to be the possible outcome of both unsupported and supported familialism and thus keep it distinct from defamilialisation by means of the direct or formally subsidised provision of services.

In general, cash benefits present a big challenge for our theoretical framework. In the first place, financial transfers (direct benefits, as well as tax credits or tax allowances) provided to individuals or families ease dependency on market income. They are, therefore, a means of decommodification. Second, when they are directed to

those who are (institutionally defined) outside the labour force – the young and the old – financial transfers also relieve other family members to a greater or lesser extent from their obligation to provide support. The modes of social policy, however, are different in the case of children and that of retired people. Maternity and parental benefits are linked to taking a leave and provide incentives for parents (mainly mothers, but in some countries also fathers) to stay at home and care for their infant children. The same applies to the child-rearing allowances which exist in a few countries. Both measures clearly belong to the supported familialism approach. Other monetary allowances for families with children, such as child benefits or child-related tax allowances, are less easily categorised, as they may be seen as a form of either decommodification of parents’ work time or decommodification of children’s care needs. The former could apply because in principle the allowances enable parents (de facto mothers) to reduce their labour market participation in order to care for their children partly by compensating their income. From this perspective, they may be interpreted as supported familialism. The latter could apply because child-related income transfers partly relieve parents of their obligation to support their children. Thus, they may be interpreted as a form of defamilialisation. In the end we opted to interpret these allowances as supported familialism, mainly because we interpret child-related benefits as a means to support parents in performing their dual role of carers and providers, rather than as a means to substitute them more or less partially. Benefits are added to parental income, not benefited from outside it. And it is parents, not children, who receive these benefits (with the rare exception of child endowment).

For the elderly, the situation is different. Financial benefits in the form of pension benefits are intended to provide an autonomous and sufficient income in old age. In particular, although pensions are normally linked to the individual’s em-

ployment and contribution history, in all EU member states there are measures for minimum income provision for the elderly either through the public pension scheme or as social assistance. Even when these measures are means-tested, and when there is a legal obligation for children to provide for parents in case of need, in no instance is children's income or children's obligations taken into account when considering an elderly person's entitlement to these measures. From this perspective, we inter-

pret minimum pension provisions to be a measure of defamilialisation in so far as they define a public responsibility for the financial autonomy of the elderly irrespective of their children's obligations.

Table 2 summarises the different policy areas we considered and how they are assigned to the three types of social policy: defamilialisation, supported familialism and unsupported familialism. The next section addresses the problems that emerge in measuring and comparing indicators.

*Table 2: General policy areas for the three policy approaches*

	<b>Responsibilities towards children</b>	<b>Responsibilities towards the elderly</b>
<b>Defamilialisation</b>	Childcare provision Education	Pensions and minimum income provision for older people Publicly funded care provision for older people
<b>Supported familialism</b>	Maternity and parental leave Child-related benefits	Cash-for-care payments with no regulation of their use
<b>Unsupported familialism</b>	Obligations to support adult children/grandchildren	Obligations to support parents in case of need

## **2.2 Structure of the database**

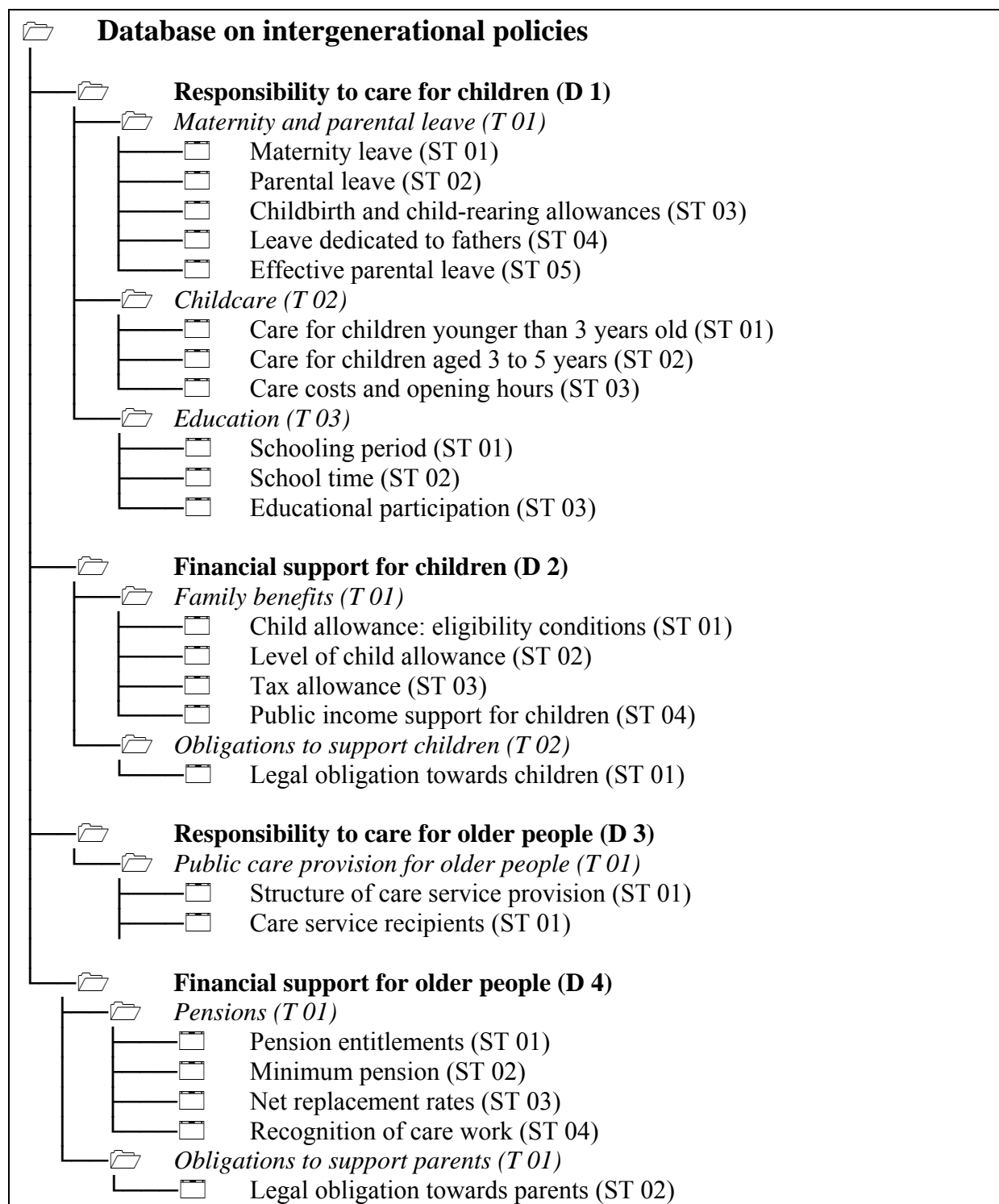
One objective of the database was to develop user-friendly and conceptually grounded access to the data. We identified three elements to promote this objective. First, there should be a clear structure to navigate between different forms of family/state responsibilities and different policy areas. The database is therefore hierarchically structured according to four levels: domains, themes, subthemes and indicators (figure 1). The domains describe the specific perspective that we apply and differentiate, on the one hand, between policies towards families with children and policies towards elderly people and, on the other hand, between financial support and support in care provision. Within each domain we identify the key policy areas (themes) which define and regulate caregiving and financial responsibilities towards children and the elderly. These policy areas are subdivided into specific subthemes, which organise the large number of indicators into smaller thematic sections. The subthemes are classified either according to specific policy measures, such as maternity/parental leave regulations, or according to separate distinct aspects or measures of policy outputs. We decided to group indicators for two reasons. On the one hand, some of the indicators, when taken individually, provide incomplete information. On the other hand, we also group indicators if they represent different model cases, in order to document variation. Each single indicator could stand alone; but in order to understand how policies work, the variation in output should be considered. An example is the net replacement rate for public pensions: we provide information for the so-called standard pensioner and for deviating model cases with lower and higher incomes, as well as for the case of an interrupted employment career.

The second element concerns the presentation of the indicators. The user navigates through the hierarchical structure and may choose a specific subtheme.

Within each subtheme a set of indicators is provided, which offer comprehensive information about a policy measure or about policy output.

The third element for a user-friendly, but also transparent, database is detailed documentation. We offer two kinds of information. The indicator's general information is explained at the top and bottom of the table. Country specific comments are attached to the country information in the table. In addition, this methodological report provides more specific information about data sources and measurement problems. The report is essential reading for understanding in what ways cross-country comparisons are limited.

**Figure 1. Structure of the database (version 2.1)**



Note: D = domain; T = theme; ST = subtheme.

## 2.3 How to use the database

Before you access the database you have to be registered (<http://multilinks-database.wzb.eu/registration>). Data access is free of charge. Within two working days you will receive your login code and pass-

word. To access the database please chose at the left hand side the rubric “Database” and type in your login information (see figure 2).

Figure 2: Database login




The screenshot shows the login interface for the WZB multilinks database. On the left, a vertical navigation menu lists: Home, Database (with a blue icon and a dashed border), Datasets, About, Documentation, Publications, Registration, and Contact. The main content area has a blue header with the WZB logo and the text 'Wissenschaftszentrum Berlin für Sozialforschung'. To the right of the header are logos for 'multilinks database', the 'SEVENTH FRAMEWORK PROGRAMME', and the European Union flag. A yellow warning box with a triangle icon and the text 'Please log in.' is positioned above the login form. Below the warning box, the text 'Member Login' is followed by the instruction 'Please login with your username and password.' The login form consists of two input fields labeled 'Username' and 'Password', and a dark blue 'Submit' button with a right-pointing arrow.

After you have successfully logged in you will see a page with a schematic overview of the structure of the database (see section 2.2). The web page offers an outline of all domains, themes and subthemes (see figure

2). The domains and themes are given for orientation. At this level you have to select a specific subtheme of interest, each of which includes a set of indicators, by clicking on the respective hyperlink.

Figure 3: Selecting a subtheme

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Please select a specific theme to display the indicators/data.

Responsibility to care for children	
Maternity and parental leave	
	<a href="#">Maternity leave</a>
	<a href="#">Parental leave</a>
	<a href="#">Childbirth and childcare allowances</a>
	<a href="#">Paternity leave</a>
	<a href="#">Comparative leave indicators</a>
Childcare	
	<a href="#">Care for children younger than 3 years old</a>
	<a href="#">Care for children aged 3-5 years old</a>
	<a href="#">Care costs and opening hours</a>
Education	
	<a href="#">Compulsory schooling period</a>
	<a href="#">School hours</a>
	<a href="#">Educational participation</a>
Financial support for children	
Family benefits	
	<a href="#">Child allowance</a>
	<a href="#">Tax allowance</a>
	<a href="#">Public income support for children</a>
Obligations to support children	
	<a href="#">Legal obligation towards children</a>
Responsibility to care for older people	
Public care provision for older people	
	<a href="#">Cash-for-care payments</a>
	<a href="#">Care service recipients</a>
Financial support for older people	
Pension	
	<a href="#">Pension entitlements</a>
	<a href="#">Minimum pension</a>
	<a href="#">Net replacement rates</a>
Obligations to support	
	<a href="#">Legal obligation towards parents</a>

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Having selected a subtheme a search screen is shown (figure 4). Here you can specify and refine the data output according to the information you would like to be displayed. The default setting is that all indicators within a subtheme will be shown for all countries and reference years.

The select all check boxes allow both to select all possible entries for indicators or countries if at least one entry is not selected and to unselect all possible entries for indicator or countries if hitherto all fields are selected.

After you had chosen you specific selection of years, indicators and countries just click on the “search” button at the lower left side of the search screen.

If you have not found the indicators you are looking for you are able to go back to the schematic overview of the key topics and chose another subtheme by clicking on the “Back to topics” button.

Figure 4: Specify indicator, reference year and countries

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Filter options

Years

2004  2009

Indicators

select all

Leave-quota reserved for the father  
 Length of paternity leave  
 Level of compensation  
 Paternity leave: Eligibility

Countries

select all

<input checked="" type="checkbox"/> Austria	<input checked="" type="checkbox"/> France	<input checked="" type="checkbox"/> Lithuania	<input checked="" type="checkbox"/> Russia
<input checked="" type="checkbox"/> Belgium	<input checked="" type="checkbox"/> Georgia	<input checked="" type="checkbox"/> Luxembourg	<input checked="" type="checkbox"/> Slovakia
<input checked="" type="checkbox"/> Bulgaria	<input checked="" type="checkbox"/> Germany	<input checked="" type="checkbox"/> Malta	<input checked="" type="checkbox"/> Slovenia
<input checked="" type="checkbox"/> Cyprus	<input checked="" type="checkbox"/> Greece	<input checked="" type="checkbox"/> Netherlands	<input checked="" type="checkbox"/> Spain
<input checked="" type="checkbox"/> Czech Republic	<input checked="" type="checkbox"/> Hungary	<input checked="" type="checkbox"/> Norway	<input checked="" type="checkbox"/> Sweden
<input checked="" type="checkbox"/> Denmark	<input checked="" type="checkbox"/> Ireland	<input checked="" type="checkbox"/> Poland	<input checked="" type="checkbox"/> United Kingdom
<input checked="" type="checkbox"/> Estonia	<input checked="" type="checkbox"/> Italy	<input checked="" type="checkbox"/> Portugal	
<input checked="" type="checkbox"/> Finland	<input checked="" type="checkbox"/> Latvia	<input checked="" type="checkbox"/> Romania	

Search

Back to topics

top

The data table is structured into three areas. Information on the domain, theme, subtheme, the indicators name, unit of measurement and the reference year is provided at the top of the table (see figure 7). In the middle section of the table the data is displayed for the chosen countries, indicators and reference years. At the bottom of the table you find the definitions of the selected indicators and the abbreviated references of the data sources. Full references are provided in this methodological report. You will reach the report by either clicking on the link below the data table or move to the documentation web page by clicking on the “Documentation” rubric on the left and side of the page.

The table includes full commentary on the indicators. In the row with the indicator name at the top level of the table there is an icon which indicates general comments on this indicator (figure 5). If the user moves the mouse pointer over the icon a text window pops up which informs about measurement details.

Figure 5: General comments

Indicator	Length of paternity leave (Days)
Year	2009
Austria	0
Belgium	14 ★
Bulgaria	Ten working days. Three days are compulsory.

Country-specific comments are indicated by blue stars accompanying the country value in the middle section. When the mouse pointer moves over a star the comment is shown (figure 6)


Figure 6: Country-specific comments

Indicator	Length of paternity leave (Days)	Level of earned i
Year	2009	2009
Austria	0	0
Belgium	14 ★	87 ★
Bulgaria	Ten working days. Three days are compulsory.	

It is possible to export the table as a Character Separated Value file (CSV) and to save it on your computer. A csv-file could for example easily imported into MS Excel. A button at the top of the table enables the user to switch back to the starting page to select a new subtheme.



Figure 6: Data table











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Domain: Responsibility to care for children			
Theme: Maternity and parental leave			
Subtheme: Paternity leave			
Indicator	 Length of paternity leave (Days)	 Level of compensation (Share of earned income)	 Leave-quota reserved for the father (Months)
Year	2009	2009	2009
Austria	0	0	0
Belgium	14 	87 	3
Bulgaria	14	100	0
Cyprus	:	:	0
Czech Republic	0	0	0
Denmark	21 	100	0
Estonia	14 	100	0
Finland	21 	75 	0.5 
France	14	100 	0
Georgia	:	:	0
Germany	0	0	2 
Greece	5	100	6.5
Hungary	7 	100	0
Ireland	0	0	3.2
Italy	0	0	6
Latvia	10	80	0
Lithuania	30	100 	0
Luxembourg	2	100 	6
Malta	0	0	3
Netherlands	2	100 	0
Norway	14	0 	2.5
Poland	0	0	0
Portugal	28 	100	4 
Romania	7 	100	0
Russia	:	:	0
Slovakia	0	0	0
Slovenia	90 	17 	0 
Spain	14	100 	0
Sweden	10	80	2
United Kingdom	14	20 	3
Definition	Maximum number of days a father is entitled to take paternity leave.	Average cash benefit during paternity leave in percentage of income before taking up leave.	Number of months of parental leave which is reserved for each of the two parents or which is explicitly allocated to fathers.
Source	GE: GGP 2009, ISSA 2009, RO: Chromkova Manea 2009, RU: GGP 2009, ISSA 2009, Kravchenko 2009, all others: Moss 2009	GE: GGP 2009, ISSA 2009, RO: Chromkova Manea 2009, RU: GGP 2009, ISSA 2009, Kravchenko 2009, all others: Moss 2009	GE: GGP 2009, ISSA 2009, RO: Chromkova Manea 2009, RU: GGP 2009, ISSA 2009, Kravchenko 2009, all others: Moss 2009

For detailed references of the data sources please see the [methodological report](#).

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### 3 Measurement problems

In the previous section we outlined at what level we collect indicators and the requirements that indicators should fulfil to contribute to our specific perspective on how the state defines and shapes intergenerational obligations. This section deals with the methodological problems encountered when identifying and constructing indicators. These problems involve, on the one hand, the validity and adequacy of the indicators and, on the other, the issue of harmonisation and comparability across countries (Atkinson, Cantillon, Marlier, and Nolan 2002; Fahey, Nolan, and Whelan 2003).

#### 3.1 Accounting for within country variation

Providing valid and adequate information on social policy output is like squaring the circle, as there are multiple variations that must be taken into account. At least four levels of variation may be identified:

1. *Variety of policy measures for a specific group.* A recent study, for example, has identified more than 140 policy measures to support families with children in Germany. Some of these measures provide support to low-income families only; some help families with special characteristics (e.g. teenage pregnancy, unemployment, a large number of children); and some assist families with specific expenses, such as costs for private care or education (Bundesministerium für Familie and Fraunhofer Institut 2006). The question in this regard is: What are the relevant – that is, most important – policy measures?
2. *Variation in the mix of public and private contributions.* In particular for social services, in many countries public authorities are not the direct provider of services, but instead regulate and (co-)finance the service sector. Financial support is provided either through social transfers to users to cover individual care costs or through subsidies to the service providers. We are faced with a semi-public service structure with great variation in the degree of public support. The question in this regard is: What is public provision, and how can it be compared across countries?
3. *Variation of single policy measures by specific characteristics of beneficiaries.* The eligibility conditions and benefits level of a policy measure may vary within the same country on the basis of personal or family characteristics. Child allowances may be more or less generous depending on the income or employment status of the parents, the birth order of children and/or the age of the child. In addition, benefits may be higher for specific groups, such as single parents, disabled children and families living in poorer regions. A policy measure may also be organised in phases, providing a different level and type of benefit for the same person over the entitlement period. For instance, maternity leave payment in the United Kingdom in 2009 provided income replacement for the first 26 weeks, a flat-rate payment for the following 13 weeks and no payment at all for the remaining 13 weeks. By contrast, in Denmark there is no distinction made between the maternity and the parental leave period in the level of compensation. The question in this regard is: How do we deal with the variation given the objective to present a manageable number of comparative indicators?
4. A fourth crucial point is *regional variation and fragmentation within countries.* Policy measures are often

regulated and implemented at a regional or municipal level, or they are administered by *parafisci*. The national government may provide only a framework legislation which may leave a varying degree of autonomy to responsible authorities in deciding about concrete entitlements. With regard to regional variation, Germany offers a telling example: the national coverage rate of public childcare facilities for children younger than three years old in Germany was 10.2 percent in 2002. Regional variation, however, was huge, ranging from around 2 to 3 percent in southwest Germany up to 56 percent in Saxony-Anhalt, the latter even above the average of Sweden at that time (Blome, Keck, and Alber 2009: 220). A similar level of variation is found in Italy, although the upper threshold is much lower. France offers an example of fragmentation across economic sectors in its public pension system: there is a general scheme for the national minimum pension; but the second part of public pensions is governed by occupational branches which, although they structure their pension schemes according to the national framework legislation, independently manage and make decisions about specific benefit provisions. The question in this regard is: How do we deal with variations of social rights and benefits within countries?

The main task of this database was to reduce complexity without disregarding the heterogeneity within a country. The first question concerns the relevant policy measures. Relevant, according to our definition, means that a policy measure should be addressed to the majority of the interested population. We therefore primarily take into account universal programmes that are provided for all members of the population concerned, or general programmes which are not restrictive to selected groups. For this reason we have not considered policies addressed only to the poor.

Only in the case of financial responsibilities towards the elderly we have considered minimum pension benefits, which concern only a minority of all pensioners, for two reasons. First, in most of the countries there are special schemes for minimum income provision for elderly people, whereas all other citizens have to rely on social assistance payments. Second, the degree to which pensioners' financial security is decommodified and defamilialised can hardly be deducted from the income replacement rate of a hypothetical standard pensioner which is –if at all – a standard case for men. Instead, looking at the minimum pension level provides information on the minimum income which is guaranteed to a person or a couple in retirement age (almost) irrespective of the pension contribution records.

With regard to the situations in which services are not provided directly by the state or local government, but are totally or partly subsidised by public funding, for our purposes we consider services to be part of a public system as long as public funding covers at least part of their cost and the state or local authorities regulate the conditions of access and delivery. We are aware that there are various degrees of unobserved state involvement in the services sector, which may level, or increase, cross-country differences. Moreover, the form that public subsidisation takes is relevant for the degree of its universality: tax allowances are more counter-distributive than are direct subsidies. From this perspective, the Netherlands, where since 2005 childcare services are private and funded through tax allowances only, is a particularly difficult case to assign in our scheme. Finally, we did not consider as part of public policies or responsibilities all instances in which there are privately organised social security schemes, even when they may be partly subsidised through tax exemptions, as long as the majority of contributions is paid by employers or the individuals themselves.

The third open issue is how to deal with the intra-country variation of benefits between social groups. One common solution is to define model or standard cases (Bradshaw, Ditch, Holmes, and Whiteford 1993; Kamerman and Kahn 1978). We used such models to limit complexity, though we also documented in what ways state benefits vary.

Regional variation is not addressed in the database itself. But when there are substantial differences between regions or municipalities, we include this information in the country-specific comments in this report. It should be noted, however, that regional information is not always available; consequently, the documentation is not complete. For the same reason, we are not able to provide information on the precise extent of regional variation, but only mention that there are considerable differences. With regard to the fragmentation of public schemes, we rely on already aggregated sources which have dealt with this issue according to their own definitions. In most cases, we have chosen the scheme or policy programme which is most prevalent in the country.

All four aspects of intra-country variation also affect the comparability of indicators across countries. The need to choose a specific portfolio of policy measures, the assumption that state involvement in different policy fields is the same in all countries, the focus on specific model cases or patterns of variation, and the fact that we did not consider regional diversity and fragmentation of policy schemes – all of these components make the picture we draw of intergenerational social policies more robust and more reliable for countries with centralised, state-operated policies than for countries with fragmented and regionalised policy systems. With our limited set of indicators, Sweden serves as an example of the former group of countries, Italy of the latter group. In the following section, we present further aspects which must be considered when making cross-country comparisons.

### **3.2 Harmonising information across countries**

The harmonisation of cross-national data involves theoretical and methodological aspects. Theoretically, the key question is what should actually be compared in order to assess the – financial or other – relevance of a specific measure for those who benefit from it. In this respect, coverage rates are easier to compare than are financial benefit levels, particularly if we consider the huge economic differences between the EU member states. The fact that in 2004 the monthly child allowances for a family with two children in Luxembourg was higher than the average net income of a production worker in the Czech Republic well exemplifies the need to relate financial benefits not only to the cost of living, but also to the average income at the national level in order to adequately assess the value of public support. In each case, therefore, we relate the financial support to an average net national income level – either as an individual net replacement rate or as a share of the average net income of a production worker in the given country.

Although conceptually easier and simpler to compare, coverage rates also pose some problems in so far as the reference population is not always clearly identifiable. In the case of childcare, the reference group is children in a certain age group; but for individuals who require long-term care, there is not a clearly comparable denominator. The number of individuals needing care may not be assumed a priori on the basis of an unambiguous indicator such as age. An actual counting of individuals is required in such conditions. Yet even in the best cases there are only estimates. Second, institutional definitions of care dependency vary across countries, and thus introduce heterogeneity into the definition of the reference population. We have followed the common practice of relating the recipients of long-term care measures to the population aged 65 and over. This definition is based on two assumptions.

The first is that all or most individuals receiving long-term care are over 65 years of age. Indeed, for the countries for which we have the data, the great majority of care recipients is old; nonetheless, we do know that there are care-dependent young persons and adults of all ages. Only a few countries, however, distinguish their data by the recipients' age, and thus it is difficult to isolate the number of elderly recipients of long-term care. The second assumption is that in all of the countries the share of individuals with care needs is about the same. This assumption has not really been tested empirically; it is based on the little information at hand.

Methodologically, several problems arise both from the different ways in which statistics are collected at the national level and from differences in the kinds of provisions considered. In particular, the comparison of social services is problematic for at least five reasons (see also Eurostat 2004):

1. Different forms of services are documented by each country: it is often not clear what kinds of services are included and accounted for in the statistics. In some countries, for example, childminders not working for an agency are not considered; in other countries they are.
2. Double-counting of services: depending on the way in which statistics are collected, in some countries service coverage is calculated on the basis of service provisions without distinguishing between multiple and single users. Thus, individuals may be counted repeatedly, particularly if statistics are based on different service providers. For instance, a care-dependent person may receive medical care, assistance in the home and meals on wheels from different providers. Each provider counts this person as a recipient, so that in sum three persons appear in the general statistics on care recipients (or coverage), whereas only one person has been served.
3. Different modes of accounting: countries differ with respect to the criteria for counting recipients. For example, in some countries a child attending a care-provider service only one day in a year is counted in the statistics. In other countries, a child must be enrolled in a childcare centre for the entire school/care year in order to be counted.
4. Differences in the intensity of care provision: some countries count short-time care arrangements, such as playgroups in the Netherlands, in the same way as full-time care provision. In other countries, these short-time arrangements are not considered. Coverage rates therefore are based on heterogeneous service definitions.
5. Finally, the data for an indicator do not always refer to the same year. For the database, we aimed to collect the data for the year 2004 and 2009. This aim, however, was not always possible on the basis of the available data. In the worst case – places in institutional care homes – the reference period ranges between 1998 and 2007. Variations in the reference year are particularly problematic in countries which have implemented recent policy reforms but still provide data referring to the old system.

The methodological problems raised above are not always evident in existing national and comparative databases. Often the documentation on the statistical concepts and sources provided in studies and databases is meagre, and it is nearly impossible to trace the collection and processing of data back to their beginnings. We attempted it for at least two indicators and failed, because international organisations such as the OECD and Eurostat mainly assemble their comparative information on the basis of national reports. There is no central contact point that has in-depth knowledge about the data. Our attempts to contact the national informants proved difficult

and in the end were not successful. We have tried to overcome these problems by cross-checking sources and consulting with our own national informants. Nonetheless, a degree of fuzziness remains. The user of the Multilinks database should thus be aware of these problems and take caution when comparing the figures across countries, particularly in the area of care provision policies.

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## 4.2 Detailed indicator descriptions

### 4.2.1 Subtheme: Maternity leave

#### Eligibility conditions for maternity leave (I1010110)

##### General information

###### Definition

The employment status that mothers-to-be must have in order to be eligible for maternity benefits.

###### Unit

Text

###### General remarks

Not considered are special regulations for self-employed and unemployed mothers.

###### Reference years

2004, 2009

###### Missing countries

None

###### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, GE: ISSA 2009, RO: Chromkova Manea 2009, RU Shcherbakova 2009, all others: Deven and Moss 2005 and Missoc 2011a

2009: GE: ISSA 2009, all other Moss 2009 and Missoc 2011b

##### Measurement

In all European countries employed mothers (to be) have the right to maternity leave some weeks before and after the birth of the child. But mothers in maternity leave only receive an income support, if they fulfil specific conditions, either they have to be in employment for a defined period or they have to be paid social security contributions for a certain period. The indicator provides information on the eligibility conditions in order to receive a maternity leave benefit. These conditions are described for employed mothers. Self-employed or unemployed may also be eligible under the same or somewhat different

conditions but they are not considered here. In some countries there is a flat rate maternity benefit which is based on residency. Also this is not part of the data description.

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## Duration of maternity leave (I1010130)

### General information

#### Definition

Maximum length of standard maternity leave.

#### Unit

Weeks

#### General remarks

Extended leave in the event of multiple births, single parenthood or other reasons is not considered.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, GE: ISSA 2009, RO: Chromkova Manea 2009, RU Shcherbakova 2009, all others: Deven and Moss 2005 and Missoc 2011a

2009: GE: ISSA 2009, all other Moss 2009 and Missoc 2011b

### Measurement

The maximum length of standard maternity leave considers the time mothers (to be) have the right to be in leave before and after childbirth. Extensions of maternity leave for different reasons, e.g. multiple births, are not considered.

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## Maternity benefit: Level of compensation (I1010140)

### General information

#### Definition

Cash benefit during maternity leave in percentage of income before taking up leave.

#### Unit

Share of earned income

#### General remarks

For flat-rate payments, the level is calculated on the basis of the net income of an average worker in the respective year.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, GE: ISSA 2009, RO: Chromkova Manea 2009, RU Shcherbakova 2009, all others: Deven and Moss 2005 and Missoc 2011a

2009: GE: ISSA 2009, all other Moss 2009 and Missoc 2011b

Reference income: Eurostat 2011e

### Measurement

The level of income compensation is expressed as the share of earned income. In the case of flat rate payments the average income of an (production) worker is used as a reference (see Annex). Income compensation is not always provided by the state but in some countries employers are obliged to provide income support during maternity leave. If it is a legal norm defined by the state, like in Germany, we consider employers contribution as well.

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## 4.2.2 Subtheme: Parental leave

### Eligibility conditions for parental leave (I1010210)

#### General information

##### Definition

Employment status parents must have in order to be eligible for parental leave.

##### Unit

Text

##### General remarks

There could be special regulations for self-employed and unemployed mothers in some countries.

##### Reference years

2004, 2009

##### Missing countries

None

##### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT, Council of Europe 2005, all others: Deven and Moss 2005.

2009: BG: Kostova 2009, CY: GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: , RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: Moss 2009.

#### Measurement

The indicator reports the employment or social security conditions which have to be fulfilled in order to be eligible for parental leave. Countries differ with regard to the integration of self-employed or unemployed parents into the parental leave scheme. This is however not addressed here.

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## Duration of net parental leave (I1010220)

### General information

#### Definition

Maximum length of net parental leave, considering the claims of both parents.

#### Unit

Months

#### General remarks

If the duration of parental leave is defined by a certain age of the child, we calculate a net period of payment by subtracting the maternity leave received after childbirth from the maximum age of the child entitling the parent to parental leave benefit.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT, Council of Europe 2005, all others: Deven and Moss 2005.

2009: BG: Kostova 2009, CY: GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: , RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: Moss 2009.

### Measurement

The duration of net parental leave is measured as the maximum length of parental leave available for both parents. In some countries the length of leave is determined by the age of the child – mostly two or three years. In such a case we subtract the time of maternity leave available after confinement from the overall parental leave time.

Leave regulation may differ between branches. In particular in some countries there are more generous regulations for public sector employees. Moreover some national laws offer part-time leave options where a parent could still work reduced hours while he or she is in parental leave. A part-time option could prolong the maximum length of parental leave. All these special regulations are not considered here but mentioned in the country-specific comments.

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## Parental leave benefit available? (I1010230)

### General information

#### Definition

Does the law guarantee parents a benefit as income compensations during the parental leave period?

#### Unit

Text

#### General remarks

The only allowances considered are those tied to parental. There are another indicators for child rearing benefits which are granted after the maximum parental leave time has been expired due to reduced working hours or restricted use of public childcare facilities.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT: Council of Europe 2005, all others: Deven and Moss 2005.

2009: BG: Kostova 2009, CY: MISSOC 2011b, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: MISSOC 2011b, NO: Herlofson 2009, Moss 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: Moss 2009.

### Measurement

This indicator provides information whether or not a (universal) parental leave benefit is available or not. If it is not it does not mean that there is no payment at all. E.g. in Spain flat rate payments are granted in some regions but not for the whole country. The eligibility conditions for receiving

a parental leave benefit are basically the same as for the take up of parental leave (see indicator: Eligibility for parental leave, I1010210).

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## Parental leave benefit: Length of payment (I1010240)

### General information

#### Definition

Number of months the parental leave benefit is paid.

#### Unit

Months

#### General remarks

If the duration of payment is defined by a certain age of the child and the specific parental leave benefit is provided after the end of maternity leave, we calculate a net period of payment by subtracting the maternity leave received after childbirth from the maximum age of the child entitling the parent to parental leave benefit. Further childcare payments beyond the time of leave are not considered here. See childcare allowances.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT: Council of Europe 2005, all others: Deven and Moss 2005.

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### Measurement

The time parental leave benefit is paid refers to the period the benefit is granted when both parents take up the maximum length of leave. If maternity leave benefits

are accounted for parental benefits the net payment period is calculated by subtracting the length of parental leave payment minus the length of maternity leave after child birth. In case of different options to chose between length of payment and level of payment we consider the option which is most generous measured by the amount granted over the whole period.

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## Parental leave benefit: Level of compensation (I1010250)

### General information

#### Definition

Average cash benefit during a parental leave benefit is paid in percentage of income before taking up leave.

#### Unit

Share of earned income

#### General remarks

For flat-rate payments, the level is calculated on the basis of the net income of an average worker in the respective year.

#### Reference years

2004, 2009

#### Missing countries

2004: Russia

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT: Council of Europe 2005, all others: Deven and Moss 2005.

2009: BG, CY: MISSOC 2011b, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: MISSOC 2011b, NO: Herlofson 2009, Moss 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: Moss 2009.

Income information: Eurostat 2011e

### Measurement

The loss of earnings during parental leave could be compensated by public benefits. These benefits may be either paid at a flat rate basis or are based on previous earnings.

Sometimes there is a sequence of different benefit levels during the parental leave time. In this case we calculate an average benefit level by weighting length of pay-

ment made by the level of payment. Unpaid periods are not considered. Flat rate benefits are expressed as a share of net income of an average (production) worker (see Annex).

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### 4.2.3 Subtheme: Childbirth and child-rearing allowances

#### Eligibility conditions for child-rearing allowance (I1010310)

##### General information

###### Definition

The criteria that parents must fulfil in order to be eligible for child-rearing allowance.

###### Unit

Text

###### General remarks

It is difficult to make a distinction between payments in connection with parental leave and childcare allowance for parents who are not employed or employed on a part-time basis only. We considered childcare allowances to be childcare benefits which are paid even when the parent is not on leave or paid longer than the maximum leave time.

###### Reference years

2004, 2009

###### Missing countries

None

###### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT: Council of Europe 2005, all others: Deven and Moss 2005 and MISSOC 2011a.

2009: BG: Kostova 2009, CY: MISSOC 2011b, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: MISSOC 2011b, NO: Herlofson 2009, Moss 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: MISSOC 2011b and Moss 2009.

##### Measurement

The key difference between parental leave benefits and child-rearing allowance is that

the former is only granted while a parent is in parental leave whereas the latter is also provided after the leave period. Child-rearing allowance is often bound the non- or reduced employment of a parent or to non-use of public childcare.

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## Child-rearing allowance: Length of payment (I1010320)

### General information

#### Definition

Number of months the child-rearing benefit is paid (after maximum parental leave time has been expired).

#### Unit

Months

#### General remarks

Care allowances are considered separately from parental leave benefits only when the allowance is paid after the maximum length of parental leave.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT: Council of Europe 2005, all others: Deven and Moss 2005 and MISSOC 2011a.

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### Measurement

When an allowance is granted both during the parental leave period as well as some time thereafter we consider only the period after the maximum of parental leave as the length of payment. The period of payment during parental leave is documented as parental leave benefit.

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## Child-rearing allowance: Level of compensation (I1010330)

### General information

#### Definition

Child-rearing allowance as a share of net income of an average worker living in a single household.

#### Unit

Share of average net income

#### General remarks

No comment

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT: Council of Europe 2005, all others: Deven and Moss 2005 and MISSOC 2011a.

2009: BG: Kostova 2009, CY: MISSOC 2011b, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: MISSOC 2011b, NO: Herlofson 2009, Moss 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: MISSOC 2011b and Moss 2009.

Income information: Eurostat 2011e

### Measurement

Child-rearing allowance are either framed as income compensation for reduced earnings due to childcare responsibilities or as a compensation for public budget savings because of unused public childcare facilities or as a compensation for private childcare costs while not using a public childcare offer. Child-rearing benefits are in all cases provided as flat rate payments. In order to make the benefits comparable, the

flat rate benefits are expressed as a share of net income of an average (production) worker (see Annex).

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- Svorenova, Maria (2009). "Multilinks National Expert Questionnaire for Slovakia." Confederation of Trade Unions of the Slovak Republic (KOZSR). Bratislava.

## Childbirth grant available? (I1010340)

### General information

#### Definition

Payment of a universal childbirth grant.

#### Unit

Yes / No

#### General remarks

The only childbirth grants which are available for the majority of new born children are considered.

#### Reference years

2004, 2009

#### Missing countries

Georgia and Russia

#### Sources

2004: BG: Kostova 2009, RO: Chromkova Manea 2009, all others: MISSOC 2011a  
2009 MISSOC 2011b

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

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### Measurement

The only childbirth grants considered are those paid for each newborn child or at least for the majority of newborn children – that is, for at least the second-born child and all subsequent children. Means- or income-tested provisions are mentioned in the comments but are not part of the indicator itself.

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- Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.
- Kostova, Dobrinka (2009). "Multilinks National Expert Questionnaire for Bulgaria." Bulgarian Academy of Science, Sofia.

## Childbirth grant: amount (I1010350)

### General information

#### Definition

Lump-sum payment for the birth of a child. If the sum differs according to birth rank, the allowance for the first child is documented.

#### Unit

Euro

#### General remarks

No comment

#### Reference years

2004, 2009

#### Missing countries

Georgia and Russia

#### Sources

2004: BG: Kostova 2009, RO: Chromkova Manea 2009, all others: MISSOC 2011a  
2009 MISSOC 2011b

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### Measurement

Amount of child birth grant in euro. The benefit is only reported, if the grant is available to a majority of new born children.

### References

- Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.
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## 4.2.4 Subtheme: Leave dedicated to fathers

### Eligibility conditions for paternity leave (I1010410)

#### General information

##### Definition

The employment status that fathers must have in order to be eligible for paternity benefits.

##### Unit

Text

##### General remarks

No comment

##### Reference years

2004, 2009

##### Missing countries

2004, 2009: Cyprus and Georgia

2004: Russia

##### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, RO: Chromkova Manea 2009, all others: Deven and Moss 2005 and Missoc 2011a

2009: Moss 2009 and Missoc 2011b

#### Measurement

Paternity leave is a legal right to have several (paid) days or weeks off from employment for men after the birth of their child. This indicator reports whether or not there is a legal right for fathers for paternity leave after his baby has been born and what conditions with regard to employment or social security period have to be fulfilled in order to be eligible for paternity leave.

#### References

Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.

Deven, Fred and Peter Moss (2005).

"Leave policies and research." Centrum voor Bevolkings- en Gezinsstudie, [http://www.sfi.dk/graphics/Leave%20network/werkdocument\\_2005\\_3.pdf](http://www.sfi.dk/graphics/Leave%20network/werkdocument_2005_3.pdf), accessed: 22.08.2011, Brussels.

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Rabušic, Ladislav (2009). "Multilinks National Expert Questionnaire for Czech Republic." Masaryk University, Brno.

## Duration of paternity leave (I1010420)

### General information

#### Definition

Maximum number of days a father is entitled to take paternity leave.

#### Unit

Days

#### General remarks

In order to make working days and weeks comparable, we set the amount of five working days equal to one week, which is seven calendar days.

#### Reference years

2004, 2009

#### Missing countries

2004, 2009: Cyprus and Georgia

2004: Russia

#### Sources

2004: BG: Kostova 2009, CZ: Rabušić 2009, RO: Chromkova Manea 2009, all others: Deven and Moss 2005 and Missoc 2011a

2009: Moss 2009 and Missoc 2011b

### Measurement

This indicator provides information on the maximum lengths of paternity leave in days. If the paternity leave is granted in weeks we assume that one week consists of five working days. If there is not paternity leave available in a country we introduced "0" days rather than allocate the missing value "not applicable" in order to obtain quantitative information for most of the countries.

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Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire

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Rabušić, Ladislav (2009). "Multilinks National Expert Questionnaire for Czech Republic." Masaryk University, Brno.

## Paternity leave: Level of compensation (I1010430)

### General information

#### Definition

Average cash benefit during paternity leave in percentage of income before taking up leave.

#### Unit

Share of earned income

#### General remarks

No comment

#### Reference years

2004, 2009

#### Missing countries

2004, 2009: Cyprus and Georgia

2004: Russia

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, RO: Chromkova Manea 2009, all others: Deven and Moss 2005 and Missoc 2011a

2009: Moss 2009 and Missoc 2011b

Income information: Eurostat 2011e

### Measurement

The level of income compensation is expressed as the share of earned income. In the case of flat rate payments the average income of an (production) worker is used as a reference. Income compensation is not always provided by the state but in some countries employers are obliged to provide income support during paternity leave. As long as this is a legal norm, we consider employers contribution as well.

### References

Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.

Deven, Fred and Peter Moss (2005). "Leave policies and research." Centrum

voor Bevolkings- en Gezinsstudie, [http://www.sfi.dk/graphics/Leave%20network/werkdocument\\_2005\\_3.pdf](http://www.sfi.dk/graphics/Leave%20network/werkdocument_2005_3.pdf), accessed: 22.08.2011, Brussels.

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## Leave-quota reserved for the father (I1010440)

### General information

#### Definition

Number of months of parental leave which is either reserved for each of the two parents or which is explicitly allocated to fathers.

#### Unit

Months

#### General remarks

For eligibility conditions, please see the respective documentation on parental leave.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, CY, GR, LU, MT, Council of Europe 2005, all others: Deven and Moss 2005.

2009: BG: Kostova 2009, CY: GE: Badurashvili 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: , RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: Moss 2009.

### Measurement

Parental leave regulations do not consider fathers particularly but provide incentives that both parents take over part of the parental leave. In most of the countries parents could decide about who actually takes parental leave and how to share the leave period between the mother and the father. This indicator considers only such regulations which offer additional rights if both parents share parental leave time; either as an individual entitlement to parental leave for each parent, so that the maximum leave

time is only available when both parents take leave, or as an extension of the leave or benefit period in case both parents share the leave time.

### References

- Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.
- Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.
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## 4.2.5 Subtheme: Comparative leave indicators

### Effective parental leave (I1010510)

#### General information

##### Definition

Duration of paid parental leave (including maternity leave) multiplied by the income replacement rate of the parental leave benefit or, alternatively, the child-rearing allowance.

##### Unit

Total leave-time in months weighted by payment level

##### General remarks

For country specific deviations please see the comments on the underlying indicators on maternity and parental leave.

##### Reference years

2004, 2009

##### Missing countries

2004: Russia

##### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Pöldma 2009, GE: Badurashvili 2009, ISSA 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, RU Shcherbakova 2009, SK: Svorenova 2009, CY, GR, LU, MT: Council of Europe 2005, all others: Deven and Moss 2005 and Missoc 2011a

2009: BG: Kostova 2009, CY: MISSOC 2011b, GE: Badurashvili 2009, ISSA 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: MISSOC 2011b, NO: Herlofson 2009, Moss 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: Moss 2009 and Missoc 2011b

Reference income: Eurostat 2011e

#### Measurement

The effective parental leave measure combines the information on the length of leave

with the level of income compensation during the leave time. It has been introduced by Platenga and Siegel (2004) and thereafter it is repeatedly used in publications. The effective parental leave provides an overall measure of generosity of leave regulations and reduces the cross country complexity into one single measure.

There are two caveats in this measure: First, it mixes up quite different leave regulations because long but low paid leaves and short well paid leaves result in the same effective leave level although they offer very different opportunities and incentives to take up leave. The second crucial issue is that in some countries there are different compensation levels during the leave time – mostly income related in a first period followed by a flat rate payment or a unpaid period. Averaging over the overall period conceals the specific incentives for parents to take leave. In order keep a link to recent scholarly work, we decided to integrate this indicator in the database although it does not disentangle our conceptual policy approaches

There are different approaches how to measure the income compensation level. Platenga and Siegel use the minimum income as the reference. The indicator presented here expresses the income compensation as a share of earned income or in case of flat rate payment as a share of the average net income of a (production) worker (see Annex).

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- Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.
- Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.

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## Length of well paid leave (I1010520)

### General information

#### Definition

Length of leave (maternity and parental) with an income replacement through benefits of 60 percent or more.

#### Unit

Months

#### General remarks

For country specific information please see the comments on the underlying indicators on length of payment and level of compensation for maternity and parental leave.

#### Reference years

2004, 2009

#### Missing countries

2004: Russia

#### Sources

2004: BG: Kostova 2009, CZ: Rabušic 2009, EE: Põldma 2009, GE: Badurashvili 2009, ISSA 2009, LV: Eglite 2009, LT: Stankuniene 2009, PL: Kotowska 2009, RO: Chromkova Manea 2009, RU Shcherbakova 2009, SK: Svorenova 2009, CY, GR, LU, MT: Council of Europe 2005, all others: Deven and Moss 2005 and Missoc 2011a

2009: BG: Kostova 2009, CY: MISSOC 2011b, GE: Badurashvili 2009, ISSA 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Moss 2010, MT: MISSOC 2011b, NO: Herlofson 2009, Moss 2009, RO: Chromkova Manea 2009, SK: Svorenova 2009, ES: Moss 2010, all others: Moss 2009 and Missoc 2011b

Reference income: Eurostat 2011e

### Measurement

Being in leave often means accepting substantial income losses because of reduced labour earnings. Therefore the decision of parents on how long they take up leave is among other things driven by economic needs. An income compensation during the leave period alleviate the economic pres-

sure in particular if a large part of the labour income is replaced by parental leave benefits. Moreover generous benefits offer better opportunities for the main earner in the family – mostly the father – to take up some of the leave. The measure on well-paid leave provides a comparative indicator of the leave time (maternity and parental leave) with substantial income replacement. High income replacement rates allow parents to be in leave without strong income losses and may provide incentives to fathers to take leave.

For some countries, e.g. Czech Republic or Luxembourg, there are huge changes between 2004 and 2009 because the income replacement level of the parental leave benefit was above the 60 % threshold in 2004 and decreased below the threshold in 2009. In both countries flat rate benefits are granted but the benefit has increased less than the average income, which is taken as the reference to calculate the income replacement rate. Thus in one reference year the whole period of parental benefit payment is considered as well paid whereas in the following reference year there is no well paid parental leave period at all.

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## 4.2.6 Subtheme: Care for children younger than 3 years old

### Individual entitlement to childcare services for children under 3 years old (I1020110)

#### General information

##### Definition

Do children under 3 years of age have an individual entitlement to public childcare provision?

##### Unit

Text

##### General remarks

We recognise individual entitlement when parents can take the issue to court if public childcare provision is not offered. In some countries, legal norms define the sufficient provision of childcare places as a responsibility of public authorities, yet parents cannot make an individual claim for a childcare place for their child.

##### Reference years

2004, 2009

##### Missing countries

None

##### Sources

2004: BG: Kostova 2009, EE: Põldma 2009, GE: Badurashvili 2009, HU: Bennett 2008, EURYDICE 2009, PT: Bennett 2008, RU: Kravchenko 2009, SI: Stropnik 2009, All others: EURYDICE 2009

2009: BG: Kostova 2009, DK: NOSOCO 2010, EE: Põldma 2009, GE: Badurashvili 2009, RU: Kravchenko 2009, SI: Stropnik 2009, All others: EURYDICE 2011b

#### Measurement

In none of the countries there is a universal right for all children under the age of three to receive childcare out of the family. If legal regulations admit the right for a childcare place, it starts either at a later age or the employment status of the parents is taken into account.

Unfortunately most of the original sources for 2004 from the EURYDICE database are not any more available at the internet. The former country reports are replaced by up-dated reports. Thus the provided URL-Link for EURYDICE (2009) works but there is no access to the 2004 information.

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## Coverage rate for children under 3 years old (I1020120)

### General information

#### Definition

Number of places in public (or publicly subsidised) childcare facilities as a share of the number of children aged 0 to 2 years.

#### Unit

Share of children aged 0–2 years

#### General remarks

No comment

#### Reference years

2004, 2009

#### Missing countries

2004: Malta and Romania

2009: all countries missing, no data available

#### Sources

BE: Meulders 2008, CZ: Platenga and Remery 2005, Rabušić 2009, GE: Badurashvili 2009, IE: Eurstat 2004, OECD 2007, IT: ISTAT 2006, RU: Kravchenko 2009, UK: Immervoll and Barber 2005, CY, DE, NL, NO, ES, SE: EURYDICE 2009, all others: Platenga and Remery 2005.

### Measurement

The number of (publicly provided) childcare places per 100 children could hardly be harmonised across countries for very different reasons. One is that there is no clear definition what kind of childcare provision is accounted. Applied statistical rules may differ with regard to the amount of care time acknowledged, the minimum duration of attendance within one (school) year, the in-/exclusion of private institutions, and the different kind of services accounted (see Eurostat 2004). Therefore figures deviate from one data source to another. Some publication mixes up coverage rates with enrolment rates or even report the usage rates based on EU-SILC data (see indicators 1020130 and 1020140).

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## Childcare usage for children under 3 years old (I1020130)

### General information

#### Definition

Children cared for in formal childcare arrangements as a percentage of all children in the same age groups.

#### Unit

Share of children aged 0–2 years

#### General remarks

2004: Reference year is 2005.

2009: No comment

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Romania and Russia

2009: Georgia, Norway and Russia

#### Sources

Eurostat 2011a

### Measurement

The data from the European Survey of Income and Living Conditions (EU-SILC), which are reported here, have become the standard source for enrolment rates of children aged 0 to 2 years. However, in the majority of countries the data are assessed as unreliable or uncertain, mainly because of too small sample sizes of households with very young children to provide statistically robust estimates.

From a conceptual point of view the information on childcare usage from the EU-SILC is of limited use because there is no differentiation whether childcare provision is public or not. In comparing coverage rates (see indicator I1020120) and usage rates, we find huge differences within countries. Some of them might be explained the methodological caveats, e.g.

full-time places in a creche might be shared by two or more children attending the care facility only at a part-time basis. That is why coverage rates are most often lower than the reported usage rates. But nevertheless the large part of the differences between the two indicators seems to be linked to the different consideration of care providers (public or private).

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## Full-time childcare usage of children under 3 years old (I1020140)

### General information

#### Definition

Children cared for in formal childcare arrangements for 30 hours or more a week as a percentage of all children in the same age groups.

#### Unit

Share of children aged 0–2 years

#### General remarks

2004: Reference year is 2005.

2009: No comment

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Romania and Russia

2009: Georgia, Norway and Russia

#### Sources

Eurostat 2011a

### Measurement

The data from the European Survey of Income and Living Conditions (EU-SILC), which are reported here, have become the standard source for enrolment rates of children aged 0 to 2 years. However, in the majority of countries the data are assessed as unreliable or uncertain, mainly because of too small sample sizes of households with very young children to provide statistically robust estimates.

An advantage of the EU-SILC data is that the amount of childcare provision is differentiated and therefore the different patterns of childcare usage between the countries are revealed. This indicator focuses only on the share of children age 0 to 2 years who receiving full-time (30 hours or more) childcare.

From a conceptual point of view the information on childcare usage from the EU-SILC is of limited use because there is no differentiation whether childcare provision is public or not. Comparing coverage rates (see indicator I1020120) and usage rates, we find huge differences within countries. Some of them might be explained the methodological caveats, e.g. full-time places in a creche might be shared by two or more children attending the care facility only at a part-time basis. That is why coverage rates are most often lower than the reported usage rates. But nevertheless the large part of the differences between the two indicators seems to be linked to the different consideration of care providers.

### References

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## 4.2.7 Subtheme: Care for children aged 3 to 5 years

### Individual entitlement to childcare services for children aged 3 to 5 years old (I1020210)

#### General information

##### Definition

Do children aged between 3 years old and school age have an individual entitlement to public childcare provision?

##### Unit

Text

##### General remarks

We recognise individual entitlement when parents can take the issue to court if public childcare provision is not offered. In some countries, legal norms define the sufficient provision of childcare places as a responsibility of public authorities, yet parents cannot make an individual claim for a childcare place for their child.

##### Reference years

2004, 2009

##### Missing countries

None

##### Sources

2004: BG: Kostova 2009, EE: Põldma 2009, GE: Badurashvili 2009, HU: Bennett 2008, EURYDICE 2009, RU: Kravchenko 2009, SI: Stropnik 2009, All others: EURYDICE 2009

2009: BG: Kostova 2009, DK: NOSOCO 2010, EE: Põldma 2009, GE: Badurashvili 2009, RU: Kravchenko 2009, SI: Stropnik 2009, All others: EURYDICE 2011b

#### Measurement

Some countries admit children only up a certain age an individual right for an childcare place. The country specific comments informs about the age threshold, if it is above the age of 3. When compulsory schooling starts before the age of six, we consider the years in compulsory education as an individual right to childcare.

Unfortunately most of the original sources for 2004 from the EURYDICE database are not any more available at the internet. The former country reports are replaced by up-dated reports. Thus the provided URL-Link for EURYDICE (2009) works but there is no access to the 2004 information.

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## Coverage rate for children aged 3 to 5 years (I1020220)

### General information

#### Definition

Number of places in public (or publicly subsidised) childcare facilities as a share of the number of children aged 3 to 5 years.

#### Unit

Share of children aged 3–5 years

#### General remarks

If the compulsory school age begins before age 6, we assume a 100 percent coverage rate for the cohort in compulsory schooling.

#### Reference years

2004, 2009

#### Missing countries

2009: all countries, no data available.

#### Sources

EE: Pöldma 2009, GE: Badurashvili 2009, LV: Eglite 2009, MT: National Statistical Office of Malta (2005); PL: Kotowska et al. 2009, RU: Kravchenko 2009, SI: Stropnik 2009, CY, NO, RO, ES, SE: EURYDICE 2009, IE, UK: OECD 2007, All others: Plantenga and Remery 2005

### Measurement

The number of (publicly provided) childcare places per 100 children for children aged 3 to 5 years is much more consolidate than the same indicator for children under the age of three (see indicator I1020120). Nevertheless we found sometime large variations between the different data sources.

Other data sources refer define the age bracket according to the age when compulsory schooling starts. This approach overcomes the challenges that different educational levels are considered (ISCED 0 and 1) but at the price of heterogeneous age groups. This kind of definition leads to comparatively low usage rates in countries with lower starting age of compulsory education, like Ireland, the Netherlands or

United Kingdom, because in those countries only the youngest age cohorts (3-4 years old) are considered which have as a rule lower enrolment rates as the 5-6 year old children.

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## Enrolment in public (pre-)primary education for children aged 3-5 (I1020230)

### General information

#### Definition

Enrolments of children aged 3-5 years in pre-primary (ISCED 0) and primary (ISCED 1) education as a percentage of all children in the age cohorts.

#### Unit

Share of children aged 3-5 years

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

GR: OECD 2011c, NL: Bennett 2008, OECD 2011b, all other countries: Unicef 2011, Eurostat 2011b, 2011c

### Measurement

The indicator has been chosen because coverage rates, that is the number of places supplied for children in pre-primary education is only available for a small number of countries in 2009. Therefore enrolment rates are provided as an alternative measure to fill the gap.

The indicator has been developed in order to overcome three restrictions which are prevalent in other data sources which report enrolment rates of young children. First it is not considered that children could be in different educational levels across countries according to the standardised ISCED classification, because primary education starts at different ages (see indicator on “Age at which compulsory school starts”). For comparative reasons it is important that both pre-primary (ISCED 0) and primary (ISCED 1) education is considered.

Second, other data sources refer not to children in a specific age bracket but define the age bracket in countries differently according to the age when compulsory schooling starts. This method overcomes the challenges that different educational levels are considered but at the price of heterogeneous age groups. This kind of definition leads to comparatively low usage rates in countries with lower starting age of compulsory education, like Ireland, the Netherlands or United Kingdom, because in those countries only the youngest age cohorts (3-4 years old) are considered which have as a rule lower enrolment rates as the 5-6 year old children.

Third, other indicators on enrolment do not consider whether the child attends a public or a private school or childcare facility. We are particularly interested in the public efforts and therefore aim to decompose public from private care/educational provision.<sup>1</sup>

The indicator given in the Multilinks database considers all children aged 3-5 years in pre-primary and primary education. For calculation we have used the enrolment rates of children age 3, 4, and 5 years either in pre-primary (ISCED 0) or primary (ISCED 1) education. We calculate the total enrolment rate in pre-primary and primary education for children age 3-5 years by weighting the yearly enrolment rates with the population size of the respective age cohort. In order to achieve the enrolment rate in public institutions we subtract the percentage of children in private institution for the different ISCED

<sup>1</sup> Private institutions could also partly publicly financed, however there is no comparative information on public subsidies paid to private educational or care institutions.

levels. Finally we sum up the to enrolment rates for ISCED 0 and ISCED 1.

### **Alternatives:**

The Information provided by Eurostat (2011a) on child care/education usage from the European Survey on Income and Living Conditions (EU-SILC) is not adequate because the data report only usage rates for children from 3 to school age. Because of differences in the starting ages of compulsory schooling, different age cohorts are compared (see above). Therefore it is also not possible to provide information on caring/schooling hours as we do for childcare usage for children aged 0-2 years.

The Unicef Transmonee database (UNICEF 2011) is an alternative source of information for Eastern European countries which allow disentangling public from private institution in pre-primary care. However the database considers pre-primary education (ISCED 0) only and neglect that in some countries children aged 3-6 attend primary education schools. We only include the rates for Georgia and Russia in order to complete our country profiles. In Georgia compulsory schooling starts in the age of 6 years and in Russia in the age of 7 years. Therefore the figures presented on pre-primary education (ISCED 0) should cover all children age 3-5 years.

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Eurostat (2011c). "Database: Population." European Commission, <http://epp.eurostat.ec.europa.eu/portal/page/portal/population/data/database>, accessed: 04.07.2011.

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## 4.2.8 Subtheme: Care costs and opening hours

### Child care costs – couple (I1020310)

#### General information

##### Definition

Net childcare costs for a dual earner family with two children in full-time care, earning 167 % of average income.

##### Unit

Share of model family income (167 % of average income)

##### General remarks

None

##### Reference years

2004

##### Missing countries

In 2004: Bulgaria, Georgia, Romania, Russia, Slovenia, and Spain.

No data for 2009. All countries are missing.

##### Sources

OECD 2011b

#### Measurement

“Net childcare costs as defined here include fees minus cash benefits, rebates and tax concessions. Subtracting the latter from the gross fee charged by the childcare provider gives the net cost to parents, i.e. the “out-of-pocket” expenses resulting from the use of a formal childcare facility. Calculations of net childcare cost relate to *full-time care for two children aged 2 and 3* in a typical *childcare facility*. The results presented below do account for tax reductions, childcare benefits and “other benefits”, which are not primarily childcare-related (e.g. family or housing benefits) but nonetheless, influence household income position.” (OECD 2011: 1).

This measure provides a country estimate. Within countries there could be a large variation depending on regional differences in childcare fees or parental characteristics (income, single parent, number of children etc.). The second indicator in the database on childcare cost for a single parent should also taken into account to have an idea on the scope of childcare costs within a country.

#### **Alternatives:**

Child care fees are reported from the same source. However, such fees reflect rather a gross rate because public subsidies which counterbalance childcare fees have to be offset. For some countries not included in the OECD statistics we find national information on childcare costs but we were not able to harmonize these national statistics in a way that they are comparable to the data provided by the OECD.

#### **References**

OECD (2011b). "OECD Family Database." OECD - Social Policy Division - Directorate of Employment, Labour and Social Affairs <http://www.oecd.org/dataoecd/52/11/42004407.pdf>, accessed: 05.07.2011.

## Child care costs – single parent (I1020315)

### General information

#### Definition

Net childcare costs for a single parent with two children in full-time care, earning 67 % of average income

#### Unit

Share of model family income (67 % of average income)

#### General remarks

None

#### Reference years

2004

#### Missing countries

In 2004: Bulgaria, Czech Republic, Georgia, Romania, Russia, Slovenia, and Spain.

No data for 2009. All countries missing.

#### Sources

OECD 2011b

### Measurement

“Net childcare costs as defined here include fees minus cash benefits, rebates and tax concessions. Subtracting the latter from the gross fee charged by the childcare provider gives the net cost to parents, i.e. the “out-of-pocket” expenses resulting from the use of a formal childcare facility. Calculations of net childcare cost relate to *full-time care for two children aged 2 and 3 in a typical childcare facility*. The results presented below do account for tax reductions, childcare benefits and “other benefits”, which are not primarily childcare-related (e.g. family or housing benefits) but nonetheless, influence household income position.” (OECD 2011: 1).

This measure provides a country estimate. Within countries there could be a large variation depending on regional differences in childcare fees or parental characteristics (income, single parent, number of children etc.). The second indicator in the database on childcare cost for a couple should also taken into account to have an idea on the scope of childcare costs within a country.

### **Alternatives:**

For some countries not included in the OECD statistics we find national information on childcare costs but we were not able to harmonize these national statistics in a way that they are comparable to the data provided by the OECD.

### **References**

OECD (2011b). "OECD Family Database." OECD - Social Policy Division - Directorate of Employment, Labour and Social Affairs  
<http://www.oecd.org/dataoecd/52/11/42004407.pdf>, accessed: 05.07.2011.

## Opening hours for pre-primary education (I1020320)

### General information

#### Definition

Standard opening hours for institutions offering pre-primary education.

#### Unit

Hours per weekday

#### General remarks

The number of hours refers to the childcare institutions' open business hours. This may not coincide with the maximum care provision hours per day available for a child. Data provided for 2009 refer to 2008.

#### Reference years

2004, 2009

#### Missing countries

In 2004: Finland, Germany, Greece

In 2009: Georgia, Germany, Greece, Spain

#### Sources

General: Council of Europe 2011, Eurydice 2009

Specific: AT: Mairhuber 2008, BE: Meulders 2008, CY: Panayiotou (2008), CZ: Křížková (2008), EE: Leetmaa (2008), GE: Badurashvili (2009), GR: Karamessini 2008, HU: Fazekas 2008, IE: Barry (2008), IT: Simonazzi (2008), LV: Trapenciene 2008, LT, Braziene 2008, LU: Plasman 2008, PL: Plomien 2008, RO: Zamfir 2008, RU: Kravchenko (2009), SK: Píscová 2008, SE: Nyberg 2008, UK: Fagan 2008

### Measurement

The indicator reports standard opening hours of childcare services outside vacations. Opening hours not necessarily coincide with the actual time a child spends in a crèche, kindergarten or with a child minder. Actual caring time might be regulated at a lower amount of hours because full-time places may be shared by two children. The standard opening hours indicate one the one hand the maximum scope

of formal childcare and other hand the flexibility in usage.

There are different assembled resources from national experts which provide information on the opening hours (Council of Europe 2011, Eurydice 2009, Reports of the Expert Group on Gender and Employment 2011). The exact reference year is not always clear and sometimes source offer contradictory information (e.g. for Belgium). We used the most detailed description of the opening hours. In the case of Austria, Belgium, Cyprus, Czech Republic, France, Hungary, Ireland, Latvia, Lithuania, and Slovakia we have adopt the 2008 information also for 2004 because the source seem to be more reliable and at the same time there is no indication that opening hours have changed within this four-year period. For Greece we find contradictory sources: According to Karamessini (2008) daylong kindergartens operate from 8.00 to 16.00. But only 48 percent of kindergartens offer day-long classes in 2007/08. In the Eurydice database (2009) for 2004 it is reported that the standard opening hours are only from 8:00 am until noon. We finally decide to set the figures for Greece as missing.

Opening hours may vary substantially between regions and between different service providers. The presented figures aim to provide opening hours which are offered by the majority of childcare services in a country. For example in Germany the regional variation is too large to provide an average figure. In 2010 In the Eastern German States 68 percent of the children age 3-5 years were in full-time (>7 hours) care whereas in the Western German States the rate is 25 percent. Even within regions there is a huge variation in opening hours between the different care providers (Statistische Ämter des Bundes und der Länder 2010).



In order to achieve a more detailed insight other information is necessary: Whether or not there meals are provided? What kind of caring curriculum is offered in particular during the early and late opening hours? What is the maximum caring time parents could decide on? How caring fees increase with extended caring hours?

### **Alternatives:**

The Information provided by Eurostat (2011a) on caring/schooling hours from the European Survey on Income and Living Conditions (EU-SILC) is not adequate because the data report only usage rates for children from 3 to school age. Because of differences in the starting ages of compulsory schooling, different age cohorts are compared.

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- Fazekas, Karoly (2008). "The Provision of Childcare Services in Hungary." Fondazione Giacomo Brodolini Roma, [http://www.fgb-egge.it/public/documets/The%20provision%20of%20childcare%20services%20in%20Hungary\\_2.pdf](http://www.fgb-egge.it/public/documets/The%20provision%20of%20childcare%20services%20in%20Hungary_2.pdf), accessed: 11.07.2011.
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## 4.2.9 Subtheme: Schooling period

### Begin of compulsory education (I1030110)

#### General information

##### Definition

Age at which compulsory primary education starts.

##### Unit

Age in years

##### General remarks

General: In some countries the last or the last two years of pre-primary education is compulsory. This is not considered here.

For 2004: Reference year is 2002/03, except for Georgia and Russia.

For 2009: Reference year is 2008, except for Georgia and Russia.

##### Reference years

2004, 2009

##### Missing countries

None

##### Sources

General: European Commission 2005, Education, Audiovisual and Culture Executive Agency 2009

Specific: GE: Badurashvili (2009), RU: Kravchenko (2009)

#### Measurement

We took the standard age at which compulsory schooling starts if there are no objections because of children's capabilities. There are different reference points at which the age of a child is relevant (calendar year, school year). Unfortunately, these differences in defining the age limit are not harmonized over the countries.

#### References

- Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.
- Education, Audiovisual and Culture Executive Agency (2009). "Key Data on Education in Europe 2009." Education, Audiovisual and Culture Executive Agency (Eurydice), [http://eacea.ec.europa.eu/education/eurydice/documents/key\\_data\\_series/105EN.pdf](http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/105EN.pdf), accessed: 11.07.2011, Brussels.
- European Commission (2005). "Key data on education in Europe 2005." Office for Official Publications of the European Communities, Luxembourg.
- Kravchenko, Zhanna (2009). "Multilinks National Expert Questionnaire for Russia." University College of South Stockholm, Stockholm.

## End of compulsory education (I1030120)

### General information

#### Definition

Age at which compulsory education ends.

#### Unit

Age in years

#### General remarks

For 2004: Reference year is 2002/03, except for Georgia and Russia.

For 2009: Reference year is 2008, except for Georgia and Russia.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

General: European Commission 2005, Education, Audiovisual and Culture Executive Agency 2009

Specific: GE: Badurashvili (2009), RU: Kravchenko (2009)

Education, Audiovisual and Culture Executive Agency (2009). "Key Data on Education in Europe 2009." Education, Audiovisual and Culture Executive Agency (Eurydice), [http://eacea.ec.europa.eu/education/eurydice/documents/key\\_data\\_series/105EN.pdf](http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/105EN.pdf), accessed: 11.07.2011, Brussels.

European Commission (2005). "Key data on education in Europe 2005." Office for Official Publications of the European Communities, Luxembourg.

Kravchenko, Zhanna (2009). "Multilinks National Expert Questionnaire for Russia." University College of South Stockholm, Stockholm.

### Measurement

We took the standard age at which compulsory schooling ends. There are different reference points at which the age of a child is relevant (calendar year, school year). Unfortunately, these differences in defining the age limit are not harmonized over the countries.

### References

Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.

## School expectancy for a 5-year-old (I1030130)

### General information

#### Definition

School expectancy is an estimate of the number of years that a typical 5-year-old child can expect to be enrolled in the education system (ISCED 0 to 6) during his or her lifetime if current enrolment patterns remain unchanged.

#### Unit

Years

#### General remarks

For 2004: Reference year is 2001/02

For 2009: Reference year is 2008,

#### Reference years

2004, 2009

#### Missing countries

In 2004 and 2009: Georgia and Russia

#### Sources

European Commission 2005, Education, Audiovisual and Culture Executive Agency 2009

### Measurement

Single-year net enrolment rates (expressed in years) for all ages are added, which means that for example an enrolment rate of 75 percent of the 19 years old population add to 9 months (75% of a year) of school expectancy. This provides an estimate of the expected number of years of education. This type of estimate will be accurate if current patterns of enrolment remain unchanged. Estimates are based on head-count data. There is no distinction between part-time and full-time studies (Audiovisual and Culture Executive Agency 2009: 107).

### References

- Education, Audiovisual and Culture Executive Agency (2009). "Key Data on Education in Europe 2009." Education, Audiovisual and Culture Executive Agency (Eurydice), [http://eacea.ec.europa.eu/education/eurydice/documents/key\\_data\\_series/105EN.pdf](http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/105EN.pdf), accessed: 11.07.2011, Brussels.
- European Commission (2005). "Key data on education in Europe 2005." Office for Official Publications of the European Communities, Luxembourg.

## Minimum working age (I1030140)

### General information

#### Definition

The minimum working age refers to the age at which a person is permitted to work full-time.

#### Unit

Age in years

#### General remarks

For 2004: No data available.

For 2009: The information applies to full-time employment only. In most countries persons are allowed to work in a family business and/or for limited hours with parental consent if they are younger than the statutory age limit.

#### Reference years

2009

#### Missing countries

No data in 2004. All countries are missing.

#### Sources

BG: Kostova 2009, GE: Badurashvili 2009, SI: Stropnik 2009, all others: Federation of European Employers 2008

### Measurement

For measurement we consider the legal age limit at which a person may work full-time. National laws on the one hand may define a higher working age under specific working conditions, e.g. for employment in hazardous environments; or on the other hand may relieve the defined age thresholds under specific circumstances, e.g. when the person works in a family business. As far as these deviations are reported in the original source we took over the information in the country specific comments.

### References

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- Kostova, Dobrinka (2009). "Multilinks National Expert Questionnaire for Bulgaria." Bulgarian Academy of Science, Sofia.
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## 4.2.10 Subtheme: Schooling time

### Before- or after-school childcare (I1030210)

#### General information

##### Definition

Percentage of pupils in the fourth year of primary education who attend a school offering a childcare service on school premises before or after lesson times, public and private sectors combined.

##### Unit

Percentage of pupils in fourth year of primary education

##### General remarks

For 2004: Reference year is 2001

For 2009: Reference year is 2006

##### Reference years

2004, 2009

##### Missing countries

In 2004: Austria, Belgium, Denmark, Estonia, Finland, Georgia, Ireland, Luxembourg, Malta, Poland, Portugal, Russia and Spain.

In 2009: Cyprus, Czech Republic, Estonia, Finland, Georgia, Greece, Ireland, Luxembourg, Malta, Portugal, and Russia

##### Sources

European Commission 2005, Education, Audiovisual and Culture Executive Agency 2009

#### Measurement

“School heads were asked in the questionnaire sent to them to indicate whether an out-of-school childcare service (before or after lessons) on school premises was offered to pupils at the school. The sampling procedure involved selecting schools and then pupils of a class in the fourth year of primary education. It sought to offer each pupil the same probability of being selected irrespective of the size of the school he or she attended. For this purpose, schools were weighted in such a way that

the probability that they would be selected was inversely proportional to their size. This explains why the figure does not directly show the proportions of schools associated with one or other of the factors at issue, but the proportions of pupils attending a school of the particular kind concerned.” (Education, Audiovisual and Culture Executive Agency 2009: 59)

In some countries (Bulgaria, Latvia, Lithuania, and Sweden) there is a substantial decrease in before- and after school childcare attendance. This does not necessarily mean that overall caring time has been decreased but maybe caused by a prolongation of schooling hours. In Norway, Romania, Slovakia, and United Kingdom school club attendance has been increased sharply within a five-year period. Unfortunately there is no information in the report on changing regulations which would allow explaining these observed changes over time.

The data originate from the PIRLS surveys conducted by International Association for the Evaluation of Educational Achievement (IEA) in 2001 and 2006.

#### References

- Education, Audiovisual and Culture Executive Agency (2009). "Key Data on Education in Europe 2009." Education, Audiovisual and Culture Executive Agency (Eurydice), [http://eacea.ec.europa.eu/education/eurydice/documents/key\\_data\\_series/105EN.pdf](http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/105EN.pdf), accessed: 11.07.2011, Brussels.
- European Commission (2005). "Key data on education in Europe 2005." Office for Official Publications of the European Communities, Luxembourg.

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International Association for the Evaluation of Educational Achievement (2011). "Progress in International Reading Literacy Study (PIRLS)." International Association for the Evaluation of Educational Achievement (IEA), <http://pirls.bc.edu/pirls2011/index.html>, accessed: 13.07.2011.



## Minimum teaching time in primary education (I1030220)

### General information

#### Definition

Recommended average minimum annual amount of teaching time in hours of 60 minutes in primary education.

#### Unit

Hours per year

#### General remarks

For 2004: Reference year is 2001/2002

For 2009: Reference year is 2009/2010

#### Reference years

2004, 2009

#### Missing countries

In 2004: Georgia

In 2009: Georgia and Russia

#### Sources

European Commission 2005, Education, Audiovisual and Culture Executive Agency 2009

### Measurement

The teaching time corresponds to the notional minimum workload of pupils and is based on minimum national recommendations. For each year of primary education, the workload is calculated by taking the average minimum daily load multiplied by the number of teaching days per year. Recreational or other breaks of any kind, as well as time spent on optional lessons, are not taken into account. The total annual amounts of minimum teaching time are added up to give the total minimum workload in hours for primary education. These values are divided by the number of years in primary education which varies across countries from four to eight years.

### References

- Education, Audiovisual and Culture Executive Agency (2009). "Key Data on Education in Europe 2009." Education, Audiovisual and Culture Executive Agency (Eurydice), [http://eacea.ec.europa.eu/education/eurydice/documents/key\\_data\\_series/105EN.pdf](http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/105EN.pdf), accessed: 11.07.2011, Brussels.
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- Eurydice (2010). "Recommended annual taught time in compulsory full-time education in Europe, 2009/10." The Education, Audiovisual and Culture Executive Agency (EACEA) [http://eacea.ec.europa.eu/education/eurydice/documents/tools/127\\_taught\\_time\\_EN.pdf](http://eacea.ec.europa.eu/education/eurydice/documents/tools/127_taught_time_EN.pdf), accessed: 13.07.2011.
- UNESCO (2009). "Education statistics." UNESCO Institute for Statistics, [http://www.uis.unesco.org/ev.php?ID=6254\\_201&ID2=DO\\_TOPIC](http://www.uis.unesco.org/ev.php?ID=6254_201&ID2=DO_TOPIC), accessed: 04.12.2009.

## Minimum teaching time in secondary education (I1030230)

### General information

#### Definition

Recommended average minimum annual amount of teaching time in hours of 60 minutes in compulsory secondary education.

#### Unit

Hours per year

#### General remarks

For 2004: Reference year is 2001/2002

For 2009: Reference year is 2009/2010

#### Reference years

2004, 2009

#### Missing countries

In 2004: Georgia

In 2009: Georgia and Russia

#### Sources

European Commission 2005, Education, Audiovisual and Culture Executive Agency 2009

### Measurement

The teaching time corresponds to the notional minimum workload of pupils and is based on minimum national recommendations. For each year of compulsory full-time secondary education, the workload is calculated by taking the average minimum daily load multiplied by the number of teaching days per year. Recreational or other breaks of any kind, as well as time spent on optional lessons, are not taken into account. The total annual amounts of minimum teaching time are added up to give the total minimum workload in hours for compulsory full-time secondary education. These values are divided by the number of years in secondary education which varies across countries from three to six years.

### References

- Education, Audiovisual and Culture Executive Agency (2009). "Key Data on Education in Europe 2009." Education, Audiovisual and Culture Executive Agency (Eurydice), [http://eacea.ec.europa.eu/education/eurydice/documents/key\\_data\\_series/105EN.pdf](http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/105EN.pdf), accessed: 11.07.2011, Brussels.
- European Commission (2005). "Key data on education in Europe 2005." Office for Official Publications of the European Communities, Luxembourg.
- Eurydice (2010). "Recommended annual taught time in compulsory full-time education in Europe, 2009/10." The Education, Audiovisual and Culture Executive Agency (EACEA) [http://eacea.ec.europa.eu/education/eurydice/documents/tools/127\\_taught\\_time\\_EN.pdf](http://eacea.ec.europa.eu/education/eurydice/documents/tools/127_taught_time_EN.pdf), accessed: 13.07.2011.
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## School holidays per school year (I1030240)

### General information

#### Definition

Total period of school holidays in weeks per school year in primary education.

#### Unit

weeks per year

#### General remarks

For 2004: Reference is the school year 2004/2005. Public holidays are not considered.

For 2009: Reference is the school year 2008/2009. Public holidays are not considered.

#### Reference years

2004, 2009

#### Missing countries

In 2004: Bulgaria, Georgia, Romania and Russia

In 2009: Georgia and Russia

#### Sources

Eurydice European Unit 2004, Eurydice 2011a

### Measurement

In most of the countries the total amount of school holidays does not differ between primary and secondary education. However, to be consistent between all countries this indicator is restricted to primary education only.

There is also more or less flexibility to adjust school holiday at the school level or regional level. However, so far deviations are reported within countries they are within the scope of  $\pm 1$  week. We do not take notice of that in the country specific comments.

The original national reports provide sometimes information in days while not accounting public holidays. Whereas in other countries Christmas and Easter holidays are part of the total school holiday measured in weeks. We harmonized the data for these two holiday periods by adding the

holidays on Christmas and Eastern for those countries which mention only those school holiday which are not a public holiday.

### References

Eurydice (2011a). "Organisation of school time in Europe. Primary and general secondary education - 2008/09 school year." Education Audiovisual & Culture Executive Agency, [http://eacea.ec.europa.eu/education/eurydice/thematic\\_studies\\_archives\\_en.php](http://eacea.ec.europa.eu/education/eurydice/thematic_studies_archives_en.php), accessed: 28.11.2011.

Eurydice European Unit (2004). "Organisation of school time in Europe. Primary and general secondary education - School year 2004/05." Eurydice European Unit, [http://eacea.ec.europa.eu/education/eurydice/thematic\\_studies\\_archives\\_en.php](http://eacea.ec.europa.eu/education/eurydice/thematic_studies_archives_en.php), accessed: 28.11.2011, Brussels.

## 4.2.11 Subtheme: Educational participation

### Early leavers from education and training (I1030310)

#### General information

##### Definition

Early leavers from education and training refers to persons aged 18 to 24 whose highest level of education or training attained is ISCED 0, 1, 2 or 3c (short) and respondents declared not having received any education or training in the four weeks preceding the survey. The denominator consists of the total population of the same age group.

##### Unit

Share of people aged 18–24

##### General remarks

Students living abroad for one year or more and conscripts on compulsory military service are not covered by the EU Labour Force Survey, which may imply higher rates than those available at national level. This is especially relevant for Cyprus.

##### Reference years

2004, 2009

##### Missing countries

In 2004: Georgia and Russia

In 2009: Georgia and Russia

##### Sources

Eurostat 2011d

#### Measurement

Early leavers from education and training refers to persons aged 18 to 24 fulfilling the following two conditions: first, the highest level of education or training attained is ISCED 0, 1, 2 or 3c short. Second, respondents declared not having received any education or training in the four

weeks preceding the survey (numerator). The data is based on an annual average of quarterly data from the EU Labour Force Survey. For further details see Eurostat (2011g)

#### References

Eurostat (2011d). "Early leavers from education and training." Statistical Office of the European Union (eurostat), <http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&plugin=1&language=en&pcode=tsisc060>, accessed: 19.07.2011.

Eurostat (2011g). "Eurostat structural indicators. Social Cohesion: Early leavers from school and training." Statistical Office of the European Union (eurostat), [http://epp.eurostat.ec.europa.eu/cache/ITY\\_SDDS/Annexes/edat\\_esms\\_an2.pdf](http://epp.eurostat.ec.europa.eu/cache/ITY_SDDS/Annexes/edat_esms_an2.pdf), accessed: 19.07.2011, Luxembourg.

## Share of tertiary students (I1030325)

### General information

#### Definition

Students (ISCED 5-6) aged 20-24 as percentage of the 20-24 year-old population.

#### Unit

Share of 20-24 year old population

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

In 2004: Georgia, Luxembourg, and Russia

In 2009: Georgia, Greece, Luxembourg, and Russia

#### Sources

Eurostat 2011f

### Measurement

The indicator sums up age-specific enrolment rates for those aged 20-24 years who are enrolled in any kind of tertiary education (ISCED 5-6). For countries like Cyprus or Malta comparability is limited because a large share of students studying abroad is not accounted. In these countries the share of students is underestimated. On the opposite in countries with high enrolment rates of foreign students the share of students among those aged 20-24 years is over-estimated.

### References

Eurostat (2011f). "Education: Participation/ Enrolment in education by sex." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=educ\\_ipart\\_s&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=educ_ipart_s&lang=en), accessed: 20.07.2011.

## Participation rates of the 15 to 24 year old population (I1030340)

### General information

#### Definition

Students (ISCED 1 to 6) aged 15 to 24 years as a percentage of corresponding age population.

#### Unit

Share of people aged 15 to 24 years

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

In 2004: Georgia, Luxembourg, and Russia

In 2009: Georgia, Greece, Luxembourg, and Russia

#### Sources

Eurostat 2011f

### Measurement

The indicator sums up age-specific enrolment rates for those aged 15-24 years who are enrolled in any kind of education programme (ISCED 1-6) and relates this number of students to the total population in this age group.

### References

Eurostat (2011f). "Education: Participation/ Enrolment in education by sex." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=educ\\_ipart\\_s&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=educ_ipart_s&lang=en), accessed: 20.07.2011.

## 4.2.12 Subtheme: Child allowance: eligibility conditions

### Eligibility condition for child allowance: Universal benefit (I2010110)

#### General information

##### Definition

Is the child allowance paid for all children of a certain age, yes or no?

##### Unit

Yes / No

##### General remarks

Child allowances are family benefits which are paid for children and which are not restricted to poor families only.

##### Reference years

2004, 2009

##### Missing countries

None

##### Sources

In 2004: BG: Kostova 2009, GE: Badurashvili 2009, RO: Chromkova Manea 2009, RU: Shcherbakova 2009, All others: MISSOC 2010a

In 2009: GE: Badurashvili 2009, RU: Shcherbakova 2009, All others: MISSOC 2010a

#### Measurement

The indicator provides information on the universality of child allowances. Child allowances are monthly public payments to parent(s) having (a certain number of) children in specific age range. Here we consider only those payments which are not targeted to poor families only.

If in the country specific comment it is mentioned that the allowance is income tested it means that the amount of child allowance depends on the household / family income level. However the benefits are not exclusively provided to families disposing over a low income. In most cases the allowance is graded so that also fami-

lies with higher incomes receive some benefits.

The information for 2004 is cross-check with the study from Bahle (2008).

#### References

- Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.
- Bahle, Thomas (2008). "Family Policy Patterns in the Enlarged EU." Pp. 100-126 in *Handbook of Quality of Life in the Enlarged European Union*, edited by J. Alber, T. Fahey, and C. Saraceno. London/New York: Routledge.
- Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.
- Kostova, Dobrinka (2009). "Multilinks National Expert Questionnaire for Bulgaria." Bulgarian Academy of Science, Sofia.
- MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.
- MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Shcherbakova, Ekaterina M. (2009). "Multilinks National Expert Questionnaire for Russia." Institute for Economic Forecasting, Russian Academy of Sciences, Moscow.



## Age until child allowance is paid (I2010120)

### General information

#### Definition

Age of the child until the child allowance is paid.

#### Unit

Age in years

#### General remarks

The age threshold may be extended if the child remains dependent mainly due to continuing education, unemployment or disability. The maximum age to receive child allowance is mentioned in the country-specific comments. In Austria, Cyprus, Germany, Greece, Italy and Spain there is no age limit for disabled children.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

In 2004: BG: Kostova 2009, GE: Badurashvili 2009, LT: Stankuniene 2009, RO: Chromkova Manea 2009, RU: Shcherbakova 2009, All others: MISSOC 2011a

In 2009: GE: Badurashvili 2009, RU: Shcherbakova 2009, All others: MISSOC 2011b

### Measurement

In most of the countries child allowance are paid until adulthood (between the age of 16 to 20 years). A precondition for the payment until the reference age could be that the child is still in full-time education or his earnings are below a certain income threshold. On the other hand the duration of payment could be extended if a child still attends an educational programme, participate in the military service or is disabled. The indicator provides information on the standard minimum age until child allowance is paid. Country specific comments mention the maximum age threshold

to receive child allowance under specific conditions.

### References

- Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.
- Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.
- Kostova, Dobrinka (2009). "Multilinks National Expert Questionnaire for Bulgaria." Bulgarian Academy of Science, Sofia.
- MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.
- MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.
- Shcherbakova, Ekaterina M. (2009). "Multilinks National Expert Questionnaire for Russia." Institute for Economic Forecasting, Russian Academy of Sciences, Moscow.
- Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## Variation of child allowance by age (I2010130)

### General information

#### Definition

Variation of child allowance on the basis of child's age.

#### Unit

Yes / No

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

Russia

#### Sources

In 2004: BG: Kostova 2009, GE: Badurashvili 2009, LT: Stankuniene 2009, RO: Chromkova Manea 2009, all others: MISSOC 2011a

In 2009: GE: Badurashvili 2009, all others: MISSOC 2011b

### Measurement

This indicator provides the information, if the level of child allowance varies with the age of the child. In some countries different consumption costs depending on the age of the child are considered and therefore benefits levels differ between age ranges.

### References

- Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.
- Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.

Kostova, Dobrinka (2009). "Multilinks National Expert Questionnaire for Bulgaria." Bulgarian Academy of Science, Sofia.

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## Variation of child allowance by number of children (I2010140)

### General information

#### Definition

Variation of child allowance on the basis of birth rank of the first three children.

#### Unit

Yes / No

#### General remarks

Higher benefits for families with more than three children are not considered as varying by birth rank because such a variation applies to only a small minority of families.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

In 2004: BG: Kostova 2009, GE: Badurashvili 2009, LT: Stankuniene 2009, RO: Chromkova Manea 2009, RU: Shcherbakova 2009, All others: MISSOC 2011a

In 2009: GE: Badurashvili 2009, RU: Shcherbakova 2009, All others: MISSOC 2011b

### Measurement

This indicator provides the information, if the level of child allowance varies by the number of children in the family. In many countries there is a surplus of benefits or an additional allowance for families with many (four or more) children. This kind of variation is not considered because it affects only a small share of families in a country.

### References

Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.

Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.

Kostova, Dobrinka (2009). "Multilinks National Expert Questionnaire for Bulgaria." Bulgarian Academy of Science, Sofia.

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Shcherbakova, Ekaterina M. (2009). "Multilinks National Expert Questionnaire for Russia." Institute for Economic Forecasting, Russian Academy of Sciences, Moscow.

Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## Variation of child allowance by other characteristics (I2010150)

### General information

#### Definition

Variation of child allowance by other characteristics besides age of the child and birth rank.

#### Unit

Text

#### General remarks

Higher benefits for families with more than three children are not considered as varying by birth rank because such a variation applies to only a small minority of families.

#### Reference years

2004, 2009

#### Missing countries

None

#### Sources

In 2004: BG: Kostova 2009, GE: Badurashvili 2009, LT: Stankuniene 2009, RO: Chromkova Manea 2009, RU: Shcherbakova 2009, all others: MISSOC 2011a

In 2009: GE: Badurashvili 2009, RU: Shcherbakova 2009, all others: MISSOC 2011b

### Measurement

The amount of child allowance may differ in some countries by other characteristics than child's age or the number of eligible children, e.g. for single parents, disabled children or poorer families. This indicator provides a list of criteria on which the level of child allowance further depends on.

### References

Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.

Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, Brno.

Kostova, Dobrinka (2009). "Multilinks National Expert Questionnaire for Bulgaria." Bulgarian Academy of Science, Sofia.

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Shcherbakova, Ekaterina M. (2009). "Multilinks National Expert Questionnaire for Lithuania." Institute for Economic Forecasting, Russian Academy of Sciences, Moscow.

Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## 4.2.12 Subtheme: Level of child allowance

### Child allowance per child in euro – 1 child (I2011510)

#### General information

##### Definition

Monthly child allowance per child for a family with an average net labour income and with one two year old child.

##### Unit

Share of net average income

##### General remarks

If the child allowances vary by the level of household income, we calculate the benefit level assuming a household with an average labour income of one person in the household.

##### Reference years

2004, 2009

##### Missing countries

2004: Bulgaria, Georgia, Romania and Russia

2009: Georgia and Russia

##### Sources

In 2004: LT: Stankuniene 2009, all others: MISSOC 2011a

In 2009: LT: Stankuniene 2009, MISSOC 2011b

#### Measurement

Child allowances are expressed here in absolute terms (euro per child). In order to harmonize the data we have defined a model family which is a couple with two children in the age of two and seven years. The family earns an average net wage. It is an indicator on the generosity of child allowances. For cross country comparison differences in income should be considered and therefore the indicator on child allowance as a share of average net earnings is a better alternative.

The level of child allowance may depend on the number of children and the age of

the child. Therefore the database offers three indicators on the amount of childcare allowance for different family models. Please consult also the indicators on child allowances for families with two or three children (I2011530 and I2011550).

#### References

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## Child allowance one child as a share of average income (I2011520)

### General information

#### Definition

Monthly child allowance for a family with an average net labour income and with one two year old child as a share of net average income.

#### Unit

Share of net average income

#### General remarks

If the child allowances vary by the level of household income, we calculate the benefit level assuming a household with an average labour income of one person in the household.

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Romania and Russia

2009: Georgia and Russia

#### Sources

In 2004: LT: Stankuniene 2009, all others: MISSOC 2011a

In 2009: LT: Stankuniene 2009, MISSOC 2011b

Reference income: Eurostat 2011e

### Measurement

This indicator provides information on the significance of child allowance as measured by the average net income of a (production) worker. In order to harmonize the data we have defined a model family which is a couple with two children in the age of two and seven years. The family earns an average net wage. Note that the child allowance is the sum the family received for two children and not per child.

The level of child allowance may depend on the number of children and the age of the child. Therefore the database offers

three indicators on the childcare allowance as a share of average net income for different family models. Please consult also the indicators on child allowances for families with two or three children (I2011540 and I2011560).

### References

Eurostat (2011e). "Earnings: Net earnings and tax rates." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn\\_nt\\_net&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn_nt_net&lang=en), accessed: 25.07.2011.

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## Child allowance per child in euro – 2 children (I2011530)

### General information

#### Definition

Monthly child allowance per child for a family with an average net labour income and with two children, 2 and 7 years old.

#### Unit

Share of net average income

#### General remarks

If the child allowances vary by the level of household income, we calculate the benefit level assuming a household with an average labour income of one person in the household.

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Romania and Russia

2009: Georgia and Russia

#### Sources

In 2004: LT: Stankuniene 2009, all others: MISSOC 2011a

In 2009: LT: Stankuniene 2009, MISSOC 2011b

### Measurement

Child allowances are expressed here in absolute terms (euro per child). In order to harmonize the data we have defined a model family which is a couple with two children in the age of two and seven years. The family earns an average net wage. It is an indicator on the generosity of child allowances. For cross country comparison differences in income should be considered and therefore the indicator on child allowance as a share of average net earnings is a better alternative.

The level of child allowance may depend on the number of children and the age of the child. Therefore the database offers three indicators on the amount of childcare

allowance for different family models. Please consult also the indicators on child allowances for families with one or three children (I2011510 and I2011550).

### References

- MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.
- MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.
- Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## Child allowance for 2 children as a share of average income (I2011540)

### General information

#### Definition

Monthly child allowance for a family with an average net labour income and with two children, 2 and 7 years old, as a share of net average income.

#### Unit

Share of net average income

#### General remarks

If the child allowances vary by the level of household income, we calculate the benefit level assuming a household with an average labour income of one person in the household.

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Romania and Russia

2009: Georgia and Russia

#### Sources

In 2004: LT: Stankuniene 2009, all others: MISSOC 2011a

In 2009: LT: Stankuniene 2009, MISSOC 2011b

Reference income: Eurostat 2011e

### Measurement

This indicator provides information on the significance of child allowance as measured by the average net income of a (production) worker. In order to harmonize the data we have defined a model family which is a couple with two children in the age of two and seven years. The family earns an average net wage. Note that the child allowance is the sum the family received for two children and not per child.

The level of child allowance may depend on the number of children and the age of the child. Therefore the database offers

three indicators on the childcare allowance as a share of average net income for different family models. Please consult also the indicators on child allowances for families with two or three children (I2011540 and I2011560).

### References

Eurostat (2011e). "Earnings: Net earnings and tax rates." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn\\_nt\\_net&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn_nt_net&lang=en), accessed: 25.07.2011.

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MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

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## Child allowance per child in euro – 3 children (I2011550)

### General information

#### Definition

Monthly child allowance per child for a family with an average net labour income and with three children, 2, 7 and 11 years old.

#### Unit

Share of net average income

#### General remarks

If the child allowances vary by the level of household income, we calculate the benefit level assuming a household with an average labour income of one person in the household.

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Romania and Russia

2009: Georgia and Russia

#### Sources

In 2004: LT: Stankuniene 2009, all others: MISSOC 2011a

In 2009: LT: Stankuniene 2009, MISSOC 2011b

### Measurement

Child allowances are expressed here in absolute terms (euro per child). In order to harmonize the data we have defined a model family which is a couple with two children in the age of two and seven years. The family earns an average net wage. It is an indicator on the generosity of child allowances. For cross country comparison differences in income should be considered and therefore the indicator on child allowance as a share of average net earnings is a better alternative.

Child allowance may depend on the number of children and the age of the child.

Therefore the database offers three indicators on the amount of childcare allowance for different family models. Please consult also the indicators on child allowances for families with two or three children (I2011510 and I2011530).

### References

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## Child allowance for 3 children as a share of average income (I2011560)

### General information

#### Definition

Monthly child allowance for a family with an average net labour income and with three children, 2, 7 and 11 years old, as a share of net average income.

#### Unit

Share of net average income

#### General remarks

If the child allowances vary by the level of household income, we calculate the benefit level assuming a household with an average labour income of one person in the household.

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Romania and Russia

2009: Georgia and Russia

#### Sources

In 2004: LT: Stankuniene 2009, all others: MISSOC 2011a

In 2009: LT: Stankuniene 2009, MISSOC 2011b

Reference income: Eurostat 2011e

### Measurement

This indicator provides information on the significance of child allowance as measured by the average net income of a (production) worker. In order to harmonize the data we have defined a model family which is a couple with two children in the age of two and seven years. The family earns an average net wage. Note that the child allowance is the sum the family received for two children and not per child.

Child allowance may depend on the number of children and the age of the child. Therefore the database offers three indica-

tors on the childcare allowance as a share of average net income for different family models. Please consult also the indicators on child allowances for families with two or three children (I2011520 and I2011540).

### References

Eurostat (2011e). "Earnings: Net earnings and tax rates." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn\\_nt\\_net&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn_nt_net&lang=en), accessed: 25.07.2011.

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/mis-soc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Stankuniene, Vlada (2009). "Multilinks National Expert Questionnaire for Lithuania." Demographic Research Centre, Institute for Social Research, Vilnius.

## 4.2.13 Subtheme: Tax allowance

### Tax deduction for children (I2010210)

#### General information

##### Definition

Is a tax deduction for children available? A tax deduction is an amount that can be subtracted, or deducted, from gross income, thus reducing the marginal income tax.

##### Unit

Yes / No

##### General remarks

A deduction for expenses for child care is not considered.

##### Reference years

2004, 2009

##### Missing countries

2004: Georgia

2009: Cyprus, Georgia, and Latvia

##### Sources

In 2004: BG: Dimitrova et al. 2010, CY: Hajispyrou et al. 2006, EE: Lüksik et al. 2008, GR: Leventi et al. 2010, LT: Ivaskaite-Tamosiune et al. 2010, LV: Vagnags and Chandler 2006, MT: Miljanic Brinkworth et al. 2010, RO: Stroe et al. 2010, RU: Kravchenko 2009, SI: Čok et al. 2008, all other: OECD 2004

In 2009: BG: Dimitrova et al. 2010, EE: Lüksik et al. 2008, GR: Leventi et al. 2010, LT: Ivaskaite-Tamosiune et al. 2010, MT: Miljanic Brinkworth et al. 2010, RO: Stroe et al. 2010, RU: Kravchenko 2009, SI: Čok et al. 2008, all other: OECD 2010

#### Measurement

The state could support families with children in many ways. One is by reducing the tax liability because of the child(ren) the tax payer has to support. In most of the countries tax allowances for children are either granted as a tax deduction from the taxable income or as a tax credit from the tax liability. This indicator describes, if a

tax deduction for children from the taxable income is available or not. We did not succeed to provide more detailed information in a comparative perspective. For quantitative figures the indicators (negative) income support for families with children are an alternative, although this indicator do not only describe tax allowances but also family benefits.

There are other options how the state could support families with children via the tax system. In some countries, like Germany or the Netherlands, expenses for child care could be deducted from the taxable income. In Cyprus the value added tax for child related goods (e.g. child clothes) is reduced. In other countries parents receive public support via the tax system under certain conditions, e.g. when they are single parents, when they have a low income, or when they are working. These specific regulations are not considered here.

#### References

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- Dimitrova, Dessislava, Ekaterina Tosheva, Dragomir Draganov, and Venelin Boshnakov (2010). "EUROMOD Update FEASIBILITY STUDY: Republic of Bulgaria." European Centre for Social Welfare Policy and Research, [http://www.euro.centre.org/data/1291995455\\_72301.pdf](http://www.euro.centre.org/data/1291995455_72301.pdf), accessed: 15.08.2011, Vienna.

- Hajispyrou, Soteroula, Demetra Komodromou, Nadia Nicolaidou, and Panos Pashardes (2006). "I-CUE Feasibility Study: Cyprus, 2005 Tax-Benefit System." Institute for Social and Economic Research (ISER), [http://www.iser.essex.ac.uk/files/msu/mod/i-cue/deliverables/I-CUE\\_D3.5.pdf](http://www.iser.essex.ac.uk/files/msu/mod/i-cue/deliverables/I-CUE_D3.5.pdf), accessed: 15.08.2011, Essex.
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- Lüpsik, Silja, Alari Paulus, and Andres Võrk (2008). "EUROMOD Country Report: Estonia 2005." Institute for Social and Economic Research (ISER), [http://www.iser.essex.ac.uk/files/msu/mod/i-cue/deliverables/I-CUE\\_D3.1.pdf](http://www.iser.essex.ac.uk/files/msu/mod/i-cue/deliverables/I-CUE_D3.1.pdf), accessed: 15.08.2011, Essex.
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## Tax credit for children (I2010220)

### General information

#### Definition

Is there a tax credit for children available?  
A tax credit is given after taxes have been calculated on the gross income. It is a reduction of the tax liability.

#### Unit

Yes / No

#### General remarks

If the child allowances vary by the level of household income, we calculate the benefit level assuming a household with an average labour income of one person in the household.

#### Reference years

2004, 2009

#### Missing countries

2004: Georgia

2009: Cyprus, Georgia, and Latvia

#### Sources

In 2004: BG: Dimitrova et al. 2010, CY: Hajispyrou et al. 2006, EE: Lüksik et al. 2008, GR: Leventi et al. 2010, LT: Ivaskaite-Tamosiune et al. 2010, LV: Vanags and Chandler 2006, MT: Miljanic Brinkworth et al. 2010, RO: Stroe et al. 2010, RU: Kravchenko 2009, SI: Čok et al. 2008, all other: OECD 2004

In 2009: BG: Dimitrova et al. 2010, EE: Lüksik et al. 2008, GR: Leventi et al. 2010, LT: Ivaskaite-Tamosiune et al. 2010, MT: Miljanic Brinkworth et al. 2010, RO: Stroe et al. 2010, RU: Kravchenko 2009, SI: Čok et al. 2008, all other: OECD 2010

### Measurement

The state could support families with children in many ways. One is by reducing the tax liability because of the child(ren) the tax payer has to support. In most of the countries tax allowances for children are either granted as a tax deduction from the taxable income or as a tax credit from the tax liability. This indicator describes, if a

tax credit for children from the tax liability is available or not. We did not succeed to provide more detailed information in a comparative perspective. For quantitative figures the indicators (negative) income support for families with children are an alternative, although this indicator do not only describe tax allowances but also family benefits.

There are other options how the state could support families with children via the tax system. In some countries, like Germany or the Netherlands, expenses for child care could be deducted from the taxable income. In Cyprus the value added tax for child related goods (e.g. child clothes) is reduced. In other countries parents receive public support via the tax system under certain conditions, e.g. when they are single parents, when they have a low income, or when they are working. These specific regulations are not considered here.

### References

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- [http://www.iser.essex.ac.uk/files/msu/mod/i-cue/deliverables/I-CUE\\_D3.5.pdf](http://www.iser.essex.ac.uk/files/msu/mod/i-cue/deliverables/I-CUE_D3.5.pdf), accessed: 15.08.2011, Essex.
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- Vanags, Alf and Mark Chandler (2006). "I-CUE Feasibility Study: Latvia. 2005 Tax-Benefit System." Institute for Social and Economic Research (ISER), [http://www.iser.essex.ac.uk/files/msu/mod/i-cue/deliverables/I-CUE\\_D3.7.pdf](http://www.iser.essex.ac.uk/files/msu/mod/i-cue/deliverables/I-CUE_D3.7.pdf), accessed: 15.08.2011, Essex.

## Tax difference by income composition (family income: 133 percent of average income) (I2010230)

### General information

#### Definition

Difference in tax rates between a single earner couple (133+0) and an equal earner couple (67+67) both with two children aged 6 and 11 years.

#### Unit

Percentage points

#### General remarks

2004: No data available

2009: Reference year is 2008.

#### Reference years

2009

#### Missing countries

2004: all countries

2009: Cyprus, Georgia and Russia

#### Sources

OECD 2011b

### References

OECD (2011b). "OECD Family Database." OECD - Social Policy Division - Directorate of Employment, Labour and Social Affairs, <http://www.oecd.org/dataoecd/52/11/42004407.pdf>, accessed: 05.07.2011.

### Measurement

Tax systems acknowledge differences in the income composition of a couple in different ways and therefore provide incentives for a one earner or dual earner model. This indicator expresses for a model family with an income of 133 percent of an average income and two children aged 6 and 11 years the differences in tax rates between a one earner (133+0) and an equal earner (67+67) income composition. Negative figures indicate that a one-earner couple has to pay fewer taxes than the equal earner couple. Positive figures state that the one earner couple have to pay more taxes than an equal earner couple.

## Tax difference by income composition (family income: 200 percent of average income) (I2010240)

### General information

#### Definition

Difference in tax rates between a single earner couple (200+0) and an equal earner couple (100+100) both with two children aged 6 and 11 years.

#### Unit

Percentage points

#### General remarks

2004: No data available

2009: Reference year is 2008.

#### Reference years

2009

#### Missing countries

2004: all countries

2009: Cyprus, Georgia and Russia

#### Sources

OECD 2011b

### References

OECD (2011b). "OECD Family Database." OECD - Social Policy Division - Directorate of Employment, Labour and Social Affairs, <http://www.oecd.org/dataoecd/52/11/42004407.pdf>, accessed: 05.07.2011.

### Measurement

Tax systems acknowledge differences in the income composition of a couple in different ways and therefore provide incentives for a one earner or dual earner model. This indicator expresses for a model family with an income of 200 percent of an average income and two children aged 6 and 11 years the differences in tax rates between a one earner (200+0) and an equal earner (100+100) income composition. Negative figures indicate that a one-earner couple has to pay fewer taxes than the equal earner couple. Positive figures state that the one earner couple have to pay more taxes than an equal earner couple.



## 4.2.14 Subtheme: Public income support for children

### Public income support for a single parent (I2010310)

#### General information

##### Definition

Difference in family benefits and tax allowances (deductions and credits) between a single parent with two children who earns 67 percent of average gross income and a single person with the same income but without children as a share of average net earnings.

##### Unit

Share of net average income

##### General remarks

None

##### Reference years

2004, 2009

##### Missing countries

2004: Georgia and Russia

2009: Cyprus, Georgia and Russia

##### Sources

Eurostat 2011e

#### Measurement

This indicator belongs to a set of indicators which estimate the public support through benefits and tax allowances for families with children. The model applied here is a single parent having two children aged 6 and 11 years with an income of 67 percent of the average income in the country. The net income of the single parent is compared to the net income of a single earner with the same income but without children. The income difference between the single parent and the single earner is expressed as a share of an average net income (see Annex).

#### References

Eurostat (2011e). "Earnings: Net earnings and tax rates." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn\\_nt\\_net&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn_nt_net&lang=en), accessed: 25.07.2011.

## Public income support for a couple with children (medium income) (I2010320)

### General information

#### Definition

Difference in family benefits and tax allowances between a couple with two children which earns 133 percent of average gross income and a couple with the same income but without children as a share of average net earnings.

#### Unit

Share of net average income

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

2004: Georgia and Russia

2009: Cyprus, Georgia and Russia

#### Sources

Eurostat 2011e

### References

Eurostat (2011e). "Earnings: Net earnings and tax rates." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn\\_nt\\_net&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn_nt_net&lang=en), accessed: 25.07.2011.

### Measurement

This indicator belongs to a set of indicators which estimate the public support through benefits and tax allowances for families with children. The model applied here is couple having two children aged 6 and 11 years with an income of 133 percent (100 + 33) of the average income in the country. The net income of the couple with children is compared to the net income of a couple with the same income but without children. The income difference between the both model cases is expressed as a share of an average net income (see Annex).

## Public income support for a couple with children (high income) (I2010330)

### General information

#### Definition

Difference in family benefits and tax allowances between a couple with two children which earns 200 percent of average gross income and a couple with the same income but without children as a share of average net earnings.

#### Unit

Share of net average income

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

2004: Georgia and Russia

2009: Cyprus, Georgia and Russia

#### Sources

Eurostat 2011e

### Measurement

This indicator belongs to a set of indicators which estimate the public support through benefits and tax allowances for families with children. The model applied here is couple having two children aged 6 and 11 years with an income of 200 percent (100 + 100) of the average income in the country. The net income of the couple with children is compared to the net income of a couple with the same income but without children. The income difference between the both model cases is expressed as a share of an average net income (see Annex).

### References

Eurostat (2011e). "Earnings: Net earnings and tax rates." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn\\_nt\\_net&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn_nt_net&lang=en), accessed: 25.07.2011.

## 4.2.15 Subtheme: Legal obligations towards children

### Age until a child can benefit from a maintenance allowance (I2020110)

#### General information

##### Definition

Age at which parents no longer have legal financial obligations towards their children.

##### Unit

Text, categorical

##### General remarks

In 2004: Different reference years. Please look at country specific comments.

In 2009: No recent data available.

##### Reference years

2004

##### Missing countries

2004: Cyprus, United Kingdom not applicable because of different regulations in England, Northern Ireland, Scotland and Wales.

2009: All countries; no data available.

##### Sources

BG: Kostova 2009, DK: Statsforvaltningerne 2011, EE: Põldma 2009, GE: Badurashvili 2009, HU: Spéder et al. 2009, NO: Herlofson 2009, RU: Kravchenko 2009, all others: European Judicial Network 2011

#### Measurement

The exact definition of the age threshold until parents have to maintain their children is not always clear. In all countries there is a clear duty that parents are obliged to support their children until they reached the age of majority (in most of the cases 18 years). This might be extended until the child finishes secondary or tertiary education or achieved a professional graduation. In some countries legal obligations of parents towards children may stop before the child reaches adulthood in case

the child earns a certain income on his/her own. However it is not always clear whether maintenance towards children last beyond the age of majority or completion of education, if the child is not able to care for him- or herself.

#### References

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## Legal obligations of other relatives to support children (I2020120)

### General information

#### Definition

Are there other relatives of a (minor) child who have obligations to provide support in case the parents are not able to support their children, yes or no?

#### Unit

Yes / No

#### General remarks

In 2009: No recent data available.

#### Reference years

2004

#### Missing countries

2004: Cyprus

2009: all countries

#### Sources

BG: Kostova 2009, EE: Põldma 2009, GE: Badurashvili 2009, HU: Spéder et al. 2009, IT: Naldini and Saraceno 2009, LV: Eglite 2009, NO: Herlofson 2009, RO: Chromkova Manea 2009, RU: Kravchenko 2009, SK: Svorenova 2009, AT, BE, DK, FI, FR, DE, IE, LU, NL, SE, UK: Lexfori 2003, CZ, GR, LT, MT, PL, PT, SI, ES: European Judicial Network 2011

### Measurement

Parents have the main responsibility to provide maintenance for their children. However if parents are dead or do not have the means to support their children in some countries other relatives have the obligation to support the child. This indicator provides information whether or not child maintenance is restricted to parents only or to other relatives. If other relatives have the obligation to support they are mentioned in the country specific comments.

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## 4.2.16 Subtheme: Structure of care service provision

### Access to care services (I3010110)

#### General information

##### Definition

Is in-kind provision for care services or subsidies to pay for services only based on care needs without considering financial resources of the person in need and her or his family?

##### Unit

Yes / No

##### General remarks

None

##### Reference years

2004, 2009

##### Missing countries

Georgia

##### Sources

2004: BG: Kostova 2009, EE: Põldma 2009, IT: Naldini and Saraceno 2009, LV: Eglite 2009, LT: Stankuniene, RO: Chromkova Manea, RU: Kravchenko 2009, HU, NL, PL: OECD 2005b, all others: MISSOC 2011a

2009: EE: Põldma 2009, IT: Naldini and Saraceno 2009, RU: Kravchenko 2009, all others: MISSOC 2011b

#### Measurement

Persons in need of care are in most countries entitled to support from long-term care services. Medical services – mostly covered by the health insurance – are not addressed here. The costs of services are not always (fully) covered by public benefits. Countries differ with regard to the universality of care service provision. There are three possible principles:

1) Costs for services provision are only subsidised by public authorities when income and/or assets of the person in need of care (and his/her family) are not sufficient

to pay the costs. Public provision depends on a means or income test basis.

2) There is a universal provision for part of the service costs but the co-payment from the person in need of care depends on his/her financial situation. This is a scheme of basic service provision with income dependent co-payments.

3) Services are provided or financed by public authorities independent of the financial resources of the person in need of care. However universal services provision may still partial and do not cover all care needs or flat-rate co-payments are expected. In some countries an additional means tested scheme for service provision accompanies the universal but partial scheme.

In most countries persons in need of care living in a nursing or residential home have to cover the costs for boarding and lodging. Here means or income test are standard. This is not considered here.

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## Cash-for-care payment (I3010125)

### General information

#### Definition

Is in-kind provision for care services or subsidies to pay for services only based on care needs without considering financial resources of the person in need and her or his family?

#### Unit

Yes / No

#### General remarks

Monetary care benefits refer to general allowances paid to all people with a specific level of care needs. It might be based on a means or income test. In almost all countries there are special schemes which cover only specific care incidents or care needs, like the invalidity insurance or extra payments for specific disabilities. These benefits are not considered here.

#### Reference years

2004, 2009

#### Missing countries

Georgia, Russia

#### Sources

2004: AT: Hörl 2005, BE: Declercq 2004, BG: Kostova 2009, CZ: Holmerová 2005, FI: Parkatti and Eskola 2004, DE: Blome, Keck, and Alber 2009, GR: Mestheneos, Triantafyllou, and Kontouka 2004, HU: Széman 2004, IE: McMahon and Barron 2004, IT: Blome, Keck, and Alber 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Ferring and Weber 2005, MT: Troisi and Famosa 2004, NL: Visser-Jansen and Knipscheer 2004, NO: Ingebretsen and Eriksen 2004, RO: Chromkova Manea 2009, ES: Jauregi 2004, SE: Johansson 2004, all others: MISSOC 2011a  
2009: LV: Eglite 2009, LT: Stankuniene 2009, all others: MISSOC 2011b

### Measurement

Person with care needs may receive cash benefits. These benefits may be granted for different reasons: satisfying additional consumption needs, financing care services, paying for a family care giver. This indicator provides information whether or not such cash benefit exists.

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## To whom is the care allowance paid (I3010130)

### General information

#### Definition

This indicator differentiates between monetary care allowances paid to the care giver from allowances paid to the person cared for.

#### Unit

Text

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

Missing: Georgia, Russia

Not applicable: Denmark, Greece and Spain (2004)

#### Sources

2004: AT: Hörl 2005, BE: Declercq 2004, BG: Kostova 2009, CZ: Holmerová 2005, FI: Parkatti and Eskola 2004, DE: Blome, Keck, and Alber 2009, GR: Mestheneos, Triantafillou, and Kontouka 2004, HU: Széman 2004, IE: McMahon and Barron 2004, IT: Blome, Keck, and Alber 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Ferring and Weber 2005, MT: Troisi and Famosa 2004, NL: Visser-Jansen and Knipscheer 2004, NO: Ingebretsen and Eriksen 2004, RO: Chromkova Manea 2009, ES: Jauregi 2004, SE: Johansson 2004, all others: MISSOC 2011a  
2009: LV: Eglite 2009, LT: Stankuniene 2009, all others: MISSOC 2011b

### Measurement

Cash benefits in relation to long-term care needs might either be paid to the person in need of care or to the caregiver. In some countries there are two or more schemes which may address both agents.

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## Formalisation of care benefit use (I3010135)

### General information

#### Definition

What formal regulations must be met in order to use cash payments either for a person cared for or for a care giver?

#### Unit

Text

#### General remarks

Categories: Formal contract: A formal employment contract has to be signed between the caregiver and the care recipient or the public authority providing the benefit. Verification of costs: The care-dependent person must verify how he or she spends the benefit. Free use of benefit: No directive on how to spend the benefit.

#### Reference years

2004, 2009

#### Missing countries

Missing: Georgia, Russia

Not applicable: Denmark, Greece and Spain (2004)

#### Sources

2004: AT: Hörl 2005, BE: Declercq 2004, BG: Kostova 2009, CZ: Holmerová 2005, FI: Parkatti and Eskola 2004, DE: Blome, Keck, and Alber 2009, GR: Mestheneos, Triantafillou, and Kontouka 2004, HU: Széman 2004, IE: McMahan and Barron 2004, IT: Blome, Keck, and Alber 2009, LV: Eglite 2009, LT: Stankuniene 2009, LU: Ferring and Weber 2005, MT: Troisi and Famosa 2004, NL: Visser-Jansen and Knipscheer 2004, NO: Ingebretsen and Eriksen 2004, RO: Chromkova Manea 2009, ES: Jauregi 2004, SE: Johansson 2004, all others: MISSOC 2011a  
2009: LV: Eglite 2009, LT: Stankuniene 2009, all others: MISSOC 2011b

### Measurement

Care allowances are differently bound to their usage. There are three main types,

depending on the purpose of the allowance and who receives it:

1) Verification of cost: Here the allowance is provided to purchase care services or pay a family member for caring.

2) Formal contract. In case of a formal contract care allowances are used to pay a privately hired caregiver, often a close relative. In order to establish this private care arrangement a formal contract between the caregiver and the person cared for is set up (sometimes with the agreement of the authority that is paying the benefit). In Sweden and Denmark family caregivers are formally employed by municipalities.

3) Free usage: There is no limitation in the use of the care allowance. In principle it could be spent for anything or given to anyone.

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## Minimum care allowance per month (I3010140)

### General information

#### Definition

The indicator shows the minimum amount that a caregiver or a care recipient receives as monetary care allowance. In countries with different levels of care allowance, this amount corresponds to the lowest level of care needs or to the shortest period of care provision permitted by the public scheme.

#### Unit

Euro per month

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

Missing: Belgium (2004), Cyprus, France, Georgia, Latvia (2004), Malta (2004), Romania (2009), Russia, Slovakia, Slovenia, Spain (2009), Sweden, United Kingdom (2004)

Not applicable: Denmark, Greece and Spain (2004)

#### Sources

2004: AT: Hörl 2005, BG: Kostova 2009, CZ: Holmerová 2005, FI: Parkatti and Eskola 2004, DE: Blome, Keck, and Alber 2009, GR: Mestheneos, Triantafyllou, and Kontouka 2004, HU: Széman 2004, IE: McMahon and Barron 2004, IT: Blome, Keck, and Alber 2009, LT: Stankuniene 2009, LU: Ferring and Weber 2005, NL: Visser-Jansen and Knipscheer 2004, NO: Ingebretsen and Eriksen 2004, all others: MISSOC 2011a

2009: LV: Eglite 2009, LT: Stankuniene 2009, all others: MISSOC 2011b

### Measurement

This indicator provides information on the lowest level of cash for care allowance. If there is more than one scheme, we provide the smaller amount as the key figure and set the higher minimum amount in paren-

thesis. To get an impression on the scope of cash for care benefits please look at the maximum amount, too.

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## Maximum care allowance per month (I3010150)

### General information

#### Definition

The indicator shows the maximum (regular) amount that a caregiver or a care recipient receives as monetary care allowance. In countries with different levels of care allowance, this amount corresponds to the highest level of care needs or to the longest period of care provision permitted by the public scheme.

#### Unit

Euro per month

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

Missing: Belgium (2004), Cyprus, France, Georgia, Hungary (2004) Latvia (2004), Lithuania (2004), Malta (2004), Netherlands (2009, Romania (2009), Russia, Slovakia, Slovenia, Spain (2009), Sweden, United Kingdom (2004)

Not applicable: Denmark, Greece and Spain (2004)

#### Sources

2004: AT: Hörl 2005, BG: Kostova 2009, CZ: Holmerová 2005, FI: Parkatti and Eskola 2004, DE: Blome, Keck, and Alber 2009, GR: Mestheneos, Triantafillou, and Kontouka 2004, IE: McMahon and Barron 2004, IT: Blome, Keck, and Alber 2009, LU: Ferring and Weber 2005, NL: Visser-Jansen and Knipscheer 2004, NO: Ingebretsen and Eriksen 2004, all others: MISSOC 2011a

2009: LV: Eglite 2009, LT: Stankuniene 2009, all others: MISSOC 2011b

### Measurement

This indicator provides information on the highest level of cash for care allowance. If there is more than one scheme, we provide the higher amount as the key figure and set

the smaller maximum amount in parenthesis. To get an impression on the scope of cash for care benefits please look at the minimum amount, too.

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## 4.2.17 Subtheme: Care service recipients

### Persons living in care institutions (I3010210)

#### General information

##### Definition

Percentage of population aged 65 and over in institutional care.

##### Unit

Share of population aged 65 and older

##### General remarks

2004: Different reference years. Comparability to 2009 is limited in case of different data sources.

2009: Comparability to 2004 limited in case of different data sources.

##### Reference years

2004, 2009

##### Missing countries

2004: Cyprus, Georgia, Latvia

2009: Austria, Bulgaria, Cyprus, Georgia, Greece, Italy, Latvia, Lithuania, Malta, Romania, Russia and United Kingdom.

##### Sources

2004: AT: Hörl 2005, OECD 2005b, BE: OECD 2011c, CZ: Holmerová 2005, DK: Leeson 2004, National Institute for Health and Welfare 2011, EE: Pöldma 2009, FI: National Institute for Health and Welfare 2011, OECD 2011c, FR: Blome et al. 2009, DE: Meyer 2004, OECD 2011c, GR Mestheneos et al. 2004, HU: OECD 2011b, IT: ISTAT 2006, IE: McMahon and Barron 2004, OECD 2011c, LU: Ferring and Weber 2005, OECD 2011c, LV: Eglite 2009, NL: OECD 2011c, NO: National Institute for Health and Welfare 2011, OECD 2011c, MT: Troisi and Farmosa 2004, PL: Błędowski and Pędich 2004, PT: Leitao et al. 2008, RU: Kravchenko 2009, SI: Touzery 2004, SK: OECD 2011c, ES: Jauregi 2004, SE: Johansson 2004, National Institute for Health and Welfare 2011, OECD 2011c, STAKES 2011, UK: Nolan et al. 2004.

2009: OECD 2011c, in addition: DK, SE: National Institute for Health and Welfare 2011, Population data: Eurostat 2011c.

#### Measurement

Comparative information on long-term care provision is still poorly developed. Figures for one country vary substantially between different data sources and for some countries the most recent data we found is still at the beginning of 2000 or even in the 1990s. The OECD offers comparative information over time which we applied always for those countries for which data for both reference year (2004 and 2009) are available.

Other obstacles are hardly to control. Is the definition of “care institution” the same across countries? Are only older people living in care institutions considered? What is the real target population of those who are in need of care? Are these care institutions public or at least the cost of caring publicly subsidised? Taken this into account, the indicator should be understood as a crude measure of institutional care provision, pinpointing whether there is a high, medium or low rate of institutional care provision.

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## Home-based care recipients (I3010220)

### General information

#### Definition

Home-based care recipients as a share of the population aged 65 and older.

#### Unit

Share of population aged 65 and older

#### General remarks

2004: Different reference years (1996–2006). If the reference year is not 2004, it is mentioned in the country specific comments.

2009: No data available.

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Cyprus, Georgia, Russia

2009: Austria, Belgium, Bulgaria, Cyprus, France, Georgia, Greece, Ireland, Italy, Latvia, Lithuania, Malta, Poland, Romania, Russia, Slovakia, Slovenia, Sweden and United Kingdom

#### Sources

2004: AT: Hörl 2005, BE: Heylen and Jappens 2009, BG: Dimova and Dimov 2004, CZ: Holmerová 2005, DK: National Institute for Health and Welfare 2011, EE: Põldma 2009, FI: OECD 2011c, National Institute for Health and Welfare 2011, FR: Jani-Le Bris 2004, DE: Meyer 2004, OECD 2011c, HU: OECD 2011c, IE: OECD 2005b, LV: OECD 2005b, LU: Ferring and Weber 2005, OECD 2011b, MT: Troisi and Farmosa 2004, NL: OECD 2011c, Visser-Jansen and Knipscheer 2004, NO: OECD 2011c, Pesaresi and Gori 2005, PL: Błędowski and Pędich 2004, PT: Leitao, Samitca, and Wall 2008, SI: Touzery 2004, ES: Jauregi 2004, SE: Johansson 2004, , GR, IT: ISTAT 2006, UK: Nolan et al. 2004, OECD 2005b.

2009: OECD 2011c and Eurostat 2011c for population data.

### Measurement

Comparative information on long-term care provision is still poorly developed. Figures for one country vary substantially between different data sources and for some countries the most recent data we found is still at the beginning of 2000 or even in the 1990s.

Other obstacles are hardly to control. Is the definition of “care services” the same across countries? Are only older people living receiving care services considered? What is the real target population of those who are in need of care? Are these care services public or at least the cost of caring publicly subsidised? Taken this into account, the indicator should be understood as a crude measure of care provision, pinpointing whether there is a high, medium or low rate of care services provision.

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23.08.2011, Amsterdam.



## 4.2.18 Subtheme: Pension entitlements

### Standard retirement age: Men (I4010110)

#### General information

##### Definition

Age at which men can be retired without having deductions taken from the pension benefit.

##### Unit

Age in years

##### General remarks

None

##### Reference years

2004, 2009

##### Missing countries

2004: Romania

2009: Georgia

##### Sources

2004: BG: Kostova 2009, GE: Badurashvili 2009, RU: Kravchenko 2009, all others: MISSOC 2011a

2009: RU: Kravchenko 2009, all others: MISSOC 2011b

#### Measurement

Some countries define a flexible retirement age which is either bounded to a certain number of contributory years or an earlier retirement leads to losses of pension claims. In those cases we considered the youngest age at which a men is eligible to receive public pensions.

We have cross checked the data with other data sources (OECD 2005a, Social Protection Committee 2007). Sometimes the information is not coherent. In those cases we document possible deviations in the country specific comments.

#### References

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## Standard retirement age: Women (I4010120)

### General information

#### Definition

Age at which women can be retired without having deductions taken from the pension benefit.

#### Unit

Age in years

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

2004: Romania

2009: Georgia

#### Sources

2004: BG: Kostova 2009, GE: Badurashvili 2009, RU: Kravchenko 2009, all others: MISSOC 2011a

2009: RU: Kravchenko 2009, all others: MISSOC 2011b

### Measurement

Some countries define a flexible retirement age which is either bounded to a certain number of contributory years or an earlier retirement leads to losses of pension claims. In those cases we considered the youngest age at which a women is eligible to receive public pensions.

We have cross checked the data with other data sources (OECD 2005a, Social Protection Committee 2007). Sometimes the information is not coherent. In those cases we document possible deviations in the country specific comments.

### References

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- MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.
- OECD (2005a). "Pensions at a Glance. Public Policies across OECD Countries." Organisation for Economic Cooperation and Development, accessed: Paris.
- Social Protection Committee (2007). "Flexibility in retirement age provision." European Commission, <http://ec.europa.eu/social/main.jsp?catId=752&langId=en&moreDocuments=yes>, accessed: 19.08.2011, Brussels.

## Effective retirement age: Men (I4010125)

### General information

#### Definition

The average effective age of retirement is calculated as a weighted average of (net) withdrawals from the labour market at different ages over a 5-year period for workers initially aged 40 and over.

#### Unit

Age in years

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

Georgia, Russia

#### Sources

OECD 2011

### Measurement

The calculation is based on the European Labour Force Survey. In order to abstract from compositional effects due to population change through death or migration) labour force withdrawals are estimated based on changes in labour force participation rates rather than labour force levels. These changes are calculated for each (synthetic) cohort aged 40 and over divided into 5-year age groups (Keese 2011). From the methodological notes it is not clear how the start of retirement is differentiated from (non-registered) unemployment or an period of inactivity, e. g. in case of elderly caregiving. In the latter cases individuals may return into the labour market.

For Germany we compared the OECD estimates with register data. For men we find a difference of around 1 year. So average retirement age for insured men according to the German Pension Fund is 60.5 in 2004 and 60.7 in 2009 (Deutsche Rentenversicherung Bund 2011: 117). The corre-

sponding OECD figures are 61.3 in 2004 and 61.8 in 2009. For insured women the estimates fit well: 2004: 60.6 versus 61.0, 2009: 60.5 versus 60.5.

### References

- OECD (2011a). "Ageing and Employment Policies - Statistics on average effective age of retirement" Organisation of Economic Co-operation and Development (OECD), [http://www.oecd.org/document/47/0,3343,en\\_2649\\_34747\\_39371887\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/document/47/0,3343,en_2649_34747_39371887_1_1_1_1,00.html), accessed: 28.11.2011.
- Keese, Marc (2011). "A method for calculating the average effective age of retirement " Organisation for Economic Co-operation and Development (OECD), <http://www.oecd.org/dataoecd/3/0/39371923.pdf>, accessed: 28.11.2011, Paris.
- Deutsche Rentenversicherung Bund (2011). "Rentenversicherung in Zeitreihen." Deutsche Rentenversicherung Bund (DRV), [http://www.deutsche-rentenversicherung-bund.de/cae/servlet/contentblob/29974/publicationFile/24462/rv\\_in\\_zeitreihen\\_pdf.pdf](http://www.deutsche-rentenversicherung-bund.de/cae/servlet/contentblob/29974/publicationFile/24462/rv_in_zeitreihen_pdf.pdf), accessed: 28.11.2011, Berlin.

## Effective retirement age: Women (I4010126)

### General information

#### Definition

The average effective age of retirement is calculated as a weighted average of (net) withdrawals from the labour market at different ages over a 5-year period for workers initially aged 40 and over.

#### Unit

Age in years

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

Georgia, Russia

#### Sources

OECD 2011

### Measurement

The calculation is based on the European Labour Force Survey. In order to abstract from compositional effects due to population change through death or migration) labour force withdrawals are estimated based on changes in labour force participation rates rather than labour force levels. These changes are calculated for each (synthetic) cohort aged 40 and over divided into 5-year age groups (Keese 2011). From the methodological notes it is not clear how the start of retirement is differentiated from (non-registered) unemployment or an period of inactivity, e. g. in case of elderly caregiving. In the latter cases individuals may return into the labour market.

For Germany we compared the OECD estimates with register data. For men we find a difference of around 1 year. So average retirement age for insured men according to the German Pension Fund is 60.5 in 2004 and 60.7 in 2009 (Deutsche Rentenversicherung Bund 2011: 117). The corresponding OECD figures are 61.3 in 2004

and 61.8 in 2009. For insured women the estimates fit well: 2004: 60.6 versus 61.0, 2009: 60.5 versus 60.5.

### References

- OECD (2011a). "Ageing and Employment Policies - Statistics on average effective age of retirement" Organisation of Economic Co-operation and Development (OECD), [http://www.oecd.org/document/47/0,3343,en\\_2649\\_34747\\_39371887\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/document/47/0,3343,en_2649_34747_39371887_1_1_1_1,00.html), accessed: 28.11.2011.
- Keese, Marc (2011). "A method for calculating the average effective age of retirement " Organisation for Economic Co-operation and Development (OECD), <http://www.oecd.org/dataoecd/3/0/39371923.pdf>, accessed: 28.11.2011, Paris.
- Deutsche Rentenversicherung Bund (2011). "Rentenversicherung in Zeitreihen." Deutsche Rentenversicherung Bund (DRV), [http://www.deutscherentenversicherung-bund.de/cae/servlet/contentblob/29974/publicationFile/24462/rv\\_in\\_zeitreihen\\_pdf.pdf](http://www.deutscherentenversicherung-bund.de/cae/servlet/contentblob/29974/publicationFile/24462/rv_in_zeitreihen_pdf.pdf), accessed: 28.11.2011, Berlin.

## Minimum contribution period (I4010130)

### General information

#### Definition

Minimum contribution period in years to be eligible for a pension benefit.

#### Unit

Number of years

#### General remarks

In countries with minimum and earnings related public pension schemes we consider contributory period of the latter.

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Ireland (not applicable)

2009: Ireland

#### Sources

2004: GE: Badurashvili 2009, RU: Kravchenko 2009, all others: MISSOC 2011a

2009: GE: Badurashvili, RU: Kravchenko 2009, all others: MISSOC 2011b

### Measurement

In order to be eligible for a public pension in most countries a claimant has to achieve a certain number of contributory periods in which he or she either has paid insurance contribution or - depending on national regulation - in which non-contributory periods are acknowledged as equivalent to contributions. For this indicator we consider only public earnings-related pension schemes.

### References

Badurashvili, Irina (2009). "Multilinks National Expert Questionnaire." Georgian Centre of Population Research, Tbilisi.

Kravchenko, Zhanna (2009). "Multilinks National Expert Questionnaire for Russia." University College of South Stockholm, Stockholm.

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

## 4.2.19 Subtheme: Minimum income security in old age

### Minimum pension, related to contribution period (I4010210)

#### General information

##### Definition

Minimum pension provision for pensioners with a certain contribution period achieved but with pension claims below a defined threshold.

##### Unit

Yes / No

##### General remarks

2009: No data available.

##### Reference years

2004

##### Missing countries

2004: Georgia, Norway, and Russia

2009: All countries, no data available.

##### Sources

2004: Social Protection Committee 2006b

#### Measurement

The organisation of minimum income security in old age may be based on very different approaches. Some countries do not have a special scheme for older people at all but only provide social assistance. In other countries within the social assistance framework a special scheme for older people is integrated which either grants them higher benefits or at least eases the eligibility criteria.

In many countries minimum income provision is part of the pension system. The programmes on minimum income security within the pension schemes could be subdivided into programmes offering a basic minimum pension income which is based on residency but not on a contributory history. The second type of programme is a minimum pension which is paid after a certain contributory period in case the ac-

quired pension claim is below a defined income threshold. In some countries there are different programmes at work to provide a minimum income security in old age. This indicator describes whether a contribution based minimum pension is available. It is one of three indicators which provide an overview on the countries programme structure for minimum income security in old age.

#### References

Social Protection Committee (2006b).

"Minimum income provision for older people and their contribution to adequacy in retirement." European Union, Social Protection Committee (SPC), [http://ec.europa.eu/employment\\_social/social\\_protection/docs/SPC%20Study%20minimum%20income%20final.pdf](http://ec.europa.eu/employment_social/social_protection/docs/SPC%20Study%20minimum%20income%20final.pdf), accessed: 22.08.2009.

## Non-contributory minimum pension (I4010220)

### General information

#### Definition

Minimum pension paid to people who have passed a specific age but have not met any qualifying contribution period of the pension scheme. Depending on the country, the pension may be paid either as a universal basic pension or as a means-tested one.

#### Unit

Yes / No

#### General remarks

2004: Please also see 'Social assistance scheme for the elderly', as it is not always clear whether a scheme belongs to the pensions system or is part of the minimum social protection schemes.

2009: No data available.

#### Reference years

2004

#### Missing countries

2004: Georgia, Norway, and Russia

2009: All countries, no data available.

#### Sources

2004: Social Protection Committee 2006b

### Measurement

The organisation of minimum income security in old age may be based on very different approaches. Some countries do not have a special scheme for older people at all but only provide social assistance. In other countries within the social assistance framework a special scheme for older people is integrated which either grants them higher benefits or at least eases the eligibility criteria.

In many countries minimum income provision is part of the pension system. The programmes on minimum income security within the pension schemes could be sub-

divided into programmes offering a basic minimum pension income which is based on residency but not on a contributory history. The second type of programme is a minimum pension which is paid after a certain contributory period in case the accrued pension claim is below a defined income threshold. In some countries there are different programmes at work to provide a minimum income security in old age. This indicator describes whether a non-contributory minimum pension is available. It is one of three indicators which provide an overview on the countries programme structure for minimum income security in old age.

### References

Social Protection Committee (2006b).

"Minimum income provision for older people and their contribution to adequacy in retirement." European Union, Social Protection Committee (SPC), [http://ec.europa.eu/employment\\_social/social\\_protection/docs/SPC%20Study%20minimum%20income%20final.pdf](http://ec.europa.eu/employment_social/social_protection/docs/SPC%20Study%20minimum%20income%20final.pdf), accessed: 22.08.2009.

## Social assistance scheme for the elderly (I4010230)

### General information

#### Definition

Minimum income provision on a means-tested basis which is especially frame for elderly people who have insufficient income within the social assistance scheme.

#### Unit

Yes / No

#### General remarks

2004: Please also see 'Non-contributory minimum pensions', as it is not always clear whether a scheme belongs to the pensions system or is part of the minimum social protection schemes.

2009: No data available.

#### Reference years

2004

#### Missing countries

2004: Georgia, Norway, and Russia

2009: All countries, no data available.

#### Sources

2004: Social Protection Committee 2006b

### Measurement

The organisation of minimum income security in old age may based on very different approaches. Some countries do not have a special scheme for older people at all but only provide social assistance. In other countries within the social assistance framework a special scheme for older people is integrated which either grant them higher benefits or at least eases the eligibility criteria.

In many countries minimum income provision is part of the pension system. The programmes on minimum income security within the pension schemes could be subdivided into programmes offering a basic minimum pension income which is based on residency but not on a contributory his-

tory. The second type of programme is a minimum pension which is paid after a certain contributory period in case the accrued pension claim is below a defined income threshold. In some countries there are different programmes at work to provide a minimum income security in old age. This indicator describes whether a special social assistance scheme of older people is available. It is one of three indicators which provide an overview on the countries programme structure for minimum income security in old age.

### References

Social Protection Committee (2006b).

"Minimum income provision for older people and their contribution to adequacy in retirement." European Union, Social Protection Committee (SPC), [http://ec.europa.eu/employment\\_social/social\\_protection/docs/SPC%20Study%20minimum%20income%20final.pdf](http://ec.europa.eu/employment_social/social_protection/docs/SPC%20Study%20minimum%20income%20final.pdf), accessed: 22.08.2009.



## Level of minimum social security in old age (I4010240)

### General information

#### Definition

Minimum social security of older people as a share of average net income of a production worker.

#### Unit

Share of average net earnings

#### General remarks

2004: The scheme available to a majority of older persons is considered. Thus, the focus is on the lowest level of income provision. More generous minimum pension schemes may exist for a subgroup of pensioners. Please see the country-specific comments to identify which pension or social assistance scheme has been selected.

2009: No data available.

#### Reference years

2004

#### Missing countries

2004: Georgia, Norway, and Russia

2009: All countries, no data available.

#### Sources

2004: Social Protection Committee 2006b  
Reference income: Eurostat 2011e

### Measurement

The level of minimum income security in old age is difficult to assess because on the one hand in some countries there is more than one scheme which offers elder people a minimum income and on the other hand the level of support may differ with age. In same countries there is a supplement for older people who have reached a defined age.

Moreover minimum income schemes for elder people may not universal but bound to a certain period of contribution into the public pension scheme. Those benefits are mostly more generous but only eligible to a

smaller share of older people. For calculating the minimum pension level we consider that scheme which is most universal.

There is no comparative data available for 2009. The MISSOC database (MISSOC 2011b) provides also information on minimum pensions but the data is too heterogeneous and in some country cases reference to a specific scheme is missing.

### References

Eurostat (2011e). "Earnings: Net earnings and tax rates." Statistical office of the European Union (eurostat), [http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn\\_nt\\_net&lang=en](http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=earn_nt_net&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

Social Protection Committee (2006b). "Minimum income provision for older people and their contribution to adequacy in retirement." European Union, Social Protection Committee (SPC), [http://ec.europa.eu/employment\\_social/social\\_protection/docs/SPC%20Study%20minimum%20income%20final.pdf](http://ec.europa.eu/employment_social/social_protection/docs/SPC%20Study%20minimum%20income%20final.pdf), accessed: 22.08.2009.

## 4.2.20 Subtheme: Net replacement rates

### Net replacement rate: Standard pensioner (I4010310)

#### General information

##### Definition

Net income replacement granted by the most general pension scheme in the respective country to a standard pensioner who retired at age 65 and worked for 40 years earning an average income. Replacement rates are calculated upon pension take-up by dividing the pension income during the first year of retirement by the income during the year preceding retirement.

##### Unit

Share of average income

##### General remarks

2009: Reference year is 2008

##### Reference years

2004, 2009

##### Missing countries

2004: Bulgaria, Georgia, Norway, Romania and Russia

2009: Georgia, Norway and Russia

##### Sources

2004: Social Protection Committee 2006a

2009: European Commission 2010

#### Measurement

The net replacement rate informs about the pension income of the theoretical pensioner. It is expressed as a share of the average income net of income taxes and employee social insurance contributions. The hypothetical case for this indicator is a pensioner at the age of 65 who has contributed for 40 years into the public pension scheme and earned during that time always an average income.

#### References

- European Commission (2010). "Joint report on pensions progress and key challenges in the delivery of adequate and sustainable pensions in Europe: Country profiles." European Commission, Directorate-General for Economic and Financial Affairs, [http://ec.europa.eu/economy\\_finance/publications/occasional\\_paper/2010/pdf/ocp71\\_country\\_profiles\\_en.pdf](http://ec.europa.eu/economy_finance/publications/occasional_paper/2010/pdf/ocp71_country_profiles_en.pdf), accessed: 22.08.2011, Brussels.
- Social Protection Committee (2006a). "Current and Prospective Theoretical Pension Replacement Rates." [http://ec.europa.eu/employment\\_social/social\\_protection/docs/isg\\_repl\\_rates\\_en.pdf](http://ec.europa.eu/employment_social/social_protection/docs/isg_repl_rates_en.pdf), accessed: 12.04.2009.

## Net replacement rate: Low-income case (I4010320)

### General information

#### Definition

Net income replacement granted by the most general pension scheme in the respective country to a pensioner who retired at age 65 and worked for 40 years earning two-thirds of the national average income. Replacement rates are calculated upon pension take-up by dividing the pension income during the first year of retirement by the income during the year preceding retirement.

#### Unit

Share of two-thirds of average income

#### General remarks

2009: Reference year is 2008

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Norway, Romania and Russia

2009: Georgia, Greece, Norway, Romania and Russia

#### Sources

2004: Social Protection Committee 2006a

2009: European Commission 2010

### Measurement

The net replacement rate informs about the pension income of the theoretical pensioner. It is expressed as a share of the average income net of income taxes and employee social insurance contributions the pensioner has earned during the year preceding retirement. The hypothetical case for this indicator is a pensioner at the age of 65 who has contributed for 40 years into the public pension scheme and earned during that time always two-thirds of an average income.

### References

- European Commission (2010). "Joint report on pensions progress and key challenges in the delivery of adequate and sustainable pensions in Europe: Country profiles." European Commission, Directorate-General for Economic and Financial Affairs, [http://ec.europa.eu/economy\\_finance/publications/occasional\\_paper/2010/pdf/ocp71\\_country\\_profiles\\_en.pdf](http://ec.europa.eu/economy_finance/publications/occasional_paper/2010/pdf/ocp71_country_profiles_en.pdf), accessed: 22.08.2011, Brussels.
- Social Protection Committee (2006a). "Current and Prospective Theoretical Pension Replacement Rates." [http://ec.europa.eu/employment\\_social/social\\_protection/docs/isg\\_repl\\_rates\\_en.pdf](http://ec.europa.eu/employment_social/social_protection/docs/isg_repl_rates_en.pdf), accessed: 12.04.2009.

## Net replacement rate: Increasing income case (I4010330)

### General information

#### Definition

Net income replacement granted by the most general pension scheme in the respective country to a pensioner who retired at age 65 and worked for 40 years, and whose earnings increased linearly from average income at the beginning up to twice the average income at the end of his career. Replacement rates are calculated upon pension take-up by dividing the pension income during the first year of retirement by the income during the year preceding retirement.

#### Unit

Share of twice the average income

#### General remarks

2009: Reference year is 2008

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Norway, Romania and Russia

2009: Georgia, Greece, Norway, Romania and Russia

#### Sources

2004: Social Protection Committee 2006a

2009: European Commission 2010

### Measurement

The net replacement rate informs about the pension income of the theoretical pensioner. It is expressed as a share of the average income net of income taxes and employee social insurance contributions the pensioner has earned during the year preceding retirement. The hypothetical case for this indicator is a pensioner at the age of 65 who has contributed for 40 years into the public pension scheme and who income increase linearly starting from aver-

age income at the beginning up to twice the average income at the end of his career.

### References

- European Commission (2010). "Joint report on pensions progress and key challenges in the delivery of adequate and sustainable pensions in Europe: Country profiles." European Commission, Directorate-General for Economic and Financial Affairs, [http://ec.europa.eu/economy\\_finance/publications/occasional\\_paper/2010/pdf/ocp71\\_country\\_profiles\\_en.pdf](http://ec.europa.eu/economy_finance/publications/occasional_paper/2010/pdf/ocp71_country_profiles_en.pdf), accessed: 22.08.2011, Brussels.
- Social Protection Committee (2006a). "Current and Prospective Theoretical Pension Replacement Rates." [http://ec.europa.eu/employment\\_social/social\\_protection/docs/isg\\_repl\\_rates\\_en.pdf](http://ec.europa.eu/employment_social/social_protection/docs/isg_repl_rates_en.pdf), accessed: 12.04.2009.

## Net replacement rate: Broken career case (I4010340)

### General information

#### Definition

Net income replacement granted by the most general pension scheme in the respective country to a pensioner who retired at age 65 and worked for 30 years earning an average income. This worker interrupted his career for 10 years altogether. Replacement rates are calculated upon pension take-up by dividing the pension income during the first year of retirement by the income during the year preceding retirement.

#### Unit

Share of average income

#### General remarks

2009: Reference year is 2008

#### Reference years

2004, 2009

#### Missing countries

2004: Bulgaria, Georgia, Norway, Romania and Russia

2009: Georgia, Greece, Norway, Romania and Russia

#### Sources

2004: Social Protection Committee 2006a

2009: European Commission 2010

### Measurement

The net replacement rate informs about the pension income of the theoretical pensioner. It is expressed as a share of the average income net of income taxes and employee social insurance contributions the pensioner has earned during the year preceding retirement. The hypothetical case for this indicator is a pensioner at the age of 65 who has contributed for 30 years into the public pension scheme and earned during that time always an average income. In the meantime, he interrupted his career for ten years without paying contributions.

### References

- European Commission (2010). "Joint report on pensions progress and key challenges in the delivery of adequate and sustainable pensions in Europe: Country profiles." European Commission, Directorate-General for Economic and Financial Affairs, [http://ec.europa.eu/economy\\_finance/publications/occasional\\_paper/2010/pdf/ocp71\\_country\\_profiles\\_en.pdf](http://ec.europa.eu/economy_finance/publications/occasional_paper/2010/pdf/ocp71_country_profiles_en.pdf), accessed: 22.08.2011, Brussels.
- Social Protection Committee (2006a). "Current and Prospective Theoretical Pension Replacement Rates." [http://ec.europa.eu/employment\\_social/social\\_protection/docs/isg\\_repl\\_rates\\_en.pdf](http://ec.europa.eu/employment_social/social_protection/docs/isg_repl_rates_en.pdf), accessed: 12.04.2009.

## Net replacement rate: 3 years of childcare (I4010350)

### General information

#### Definition

Net income replacement granted by the most general pension scheme in the respective country to a pensioner who retired at age 65 and worked for 37 years earning an average income. This worker interrupted his career for 3 years to care for a child. Replacement rates are calculated upon pension take-up by dividing the pension income during the first year of retirement by the income during the year preceding retirement.

#### Unit

Share of average income

#### General remarks

2009: Reference year is 2008

#### Reference years

2009

#### Missing countries

2004: All countries, no data available.

2009: Georgia, Greece, Norway, Romania and Russia

#### Sources

2009: European Commission 2010

### Measurement

The net replacement rate informs about the pension income of the theoretical pensioner. It is expressed as a share of the average income net of income taxes and employee social insurance contributions the pensioner has earned during the year preceding retirement. The hypothetical case for this indicator is a pensioner at the age of 65 who has contributed for 37 years into the public pension scheme and earned during that time always an average income. In the meantime, he interrupted his career for three years without paying contributions to care for a child.

### References

European Commission (2010). "Joint report on pensions progress and key challenges in the delivery of adequate and sustainable pensions in Europe: Country profiles." European Commission, Directorate-General for Economic and Financial Affairs, [http://ec.europa.eu/economy\\_finance/publications/occasional\\_paper/2010/pdf/ocp71\\_country\\_profiles\\_en.pdf](http://ec.europa.eu/economy_finance/publications/occasional_paper/2010/pdf/ocp71_country_profiles_en.pdf), accessed: 22.08.2011, Brussels.

## 4.2.21 Subtheme: Recognition of care work

### Credited non-contribution periods for child rearing (I4010410)

#### General information

##### Definition

Non-contribution periods for childcare credited or taken into account either to determine eligibility or to calculate the pension level.

##### Unit

Yes / No

##### General remarks

None

##### Reference years

2004, 2009

##### Missing countries

2004: Georgia, Russia

2009: Georgia, Russia

##### Sources

2004: BG: Kostova 2009, RO: Chromkova Manea, all others: MISSOC 2011a

2009 MISSOC 2011b

#### Measurement

This indicator provides only crude categorical information whether own or foster children are acknowledged for determining a pension claim beyond maternity and parental leave. Our aim was to achieve a more detailed description of such non-contributory periods for child care but we neither found in depths information for all the countries nor were we able to harmonise the data in order to provide insight in which countries the acknowledgement of child care is more or less generous. Countries may differ according to two structural determinants:

1) Non-contributory periods due to childcare could either be acknowledged for pension level calculation and therefore the pension benefit increases or non-contributory periods due to childcare are only acknowledged in order to achieve the eli-

gibility criteria but do not have an impact on the pension level in case eligibility criteria are met.

2) Periods without pension contribution are either substitutive to contributions and parents (mothers) caring for a child are accredited a fixed contribution equivalent or they are additive and consider also part-time employment, thus summing up income related claims and contribution equivalents for childcare.

Moreover acknowledgement of childcare differs between the countries with regard to the age of the child and the number of children.

#### References

Chromkova Manea, Beatrice (2009). "Multilinks National Expert Questionnaire for Romania." Masaryk University, accessed: Brno.

Kostova, Dobrinka (2009). "Multilinks National Expert Questionnaire for Bulgaria." Bulgarian Academy of Science, Sofia.

MISSOC (2011a). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: May 2004." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20040501&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20040501&lang=en), accessed: 25.07.2011.

MISSOC (2011b). "Mutual Information System on Social Protection (MISSOC). Comparative Tables on Social Protection: July 2009." European Commission, [http://ec.europa.eu/employment\\_social/missoc/db/public/compareTables.do?year=20090701&lang=en](http://ec.europa.eu/employment_social/missoc/db/public/compareTables.do?year=20090701&lang=en), accessed: 25.07.2011.

## Credited non-contribution periods for caring for an adult (I4010420)

### General information

#### Definition

Non-contribution periods for caring for an adult which are credited or taken into account either to determine eligibility or to calculate the pension level.

#### Unit

Yes / No

#### General remarks

None

#### Reference years

2004, 2009

#### Missing countries

2004: Georgia, Russia

2009: Georgia, Russia

#### Sources

2004: BG: Kostova 2009, RO: Chromkova Manea, all others: MISSOC 2011a

2009 MISSOC 2011b

### Measurement

This indicator provides only crude categorical information whether care for an adult relative determines the pension claim. Our aim was to achieve a more detailed description of such non-contributory periods for private caregiving but we neither found in depths information for all the countries nor were we able to harmonise the data in order to provide insight in which countries the acknowledgement of child care is more or less generous. Countries may differ according to two structural determinants:

1) Non-contributory periods due to care responsibilities could either be acknowledged for pension level calculation and therefore the pension benefit increases or non-contributory periods due to care are only acknowledged in order to achieve the eligibility criteria but do not have an impact on the

pension level in case eligibility criteria are met.

2) Periods without pension contribution are either substitutive to contributions and caregivers are accredited a fixed contribution equivalent or they are additive and consider also part-time employment, thus summing up income related pension claims and contribution equivalents for childcare.

Moreover acknowledgement of care for an adult person differs between the countries with regard to the relationship to the person in need of care and the level of care dependency or caregivers amount of care provision.

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## 4.2.22 Subtheme: Legal obligation towards parents

### Children's legal obligation to support parents (I4020110)

#### General information

##### Definition

Do adult children have the legal obligation to support their parents?

##### Unit

Yes / No

##### General remarks

2004: Different reference years. Please check the country specific comments.

2009: No data available

##### Reference years

2004

##### Missing countries

2004: Cyprus, Denmark

2009: All countries, no data available.

##### Sources

2004: BG: Kostova 2009, EE: Põldma 2009, GE: Badurashvili 2009, HU: Spéder et al. 2009, NL: Dykstra et al. 2009, NO: Herlofson 2009, RU: Kravchenko 2009, all other. European Judicial Network 2011

#### Measurement

The Dutch case point to a possible overlap of laws. In the Netherlands the civil code does give adult children maintenance responsibilities for parents, but this is overruled by the 1965 National Assistance Act which states that all 'needy' adults have a right to claim financial support which cannot be recovered from their family. Although there are legal maintenance claims of parents towards their children, the regulation on minimum income provision does not recourse on the income or wealth of children or only recourse to children with higher incomes. Therefore de facto (most of the) children do not have to support their parents. We were not able to proof, if there other countries with similar interlaced legal regulations. Therefore we de-

cide in the Dutch case that there are legal obligations from children to parents for data harmonization.

It is also important to notice that maintenance claims from parents to children or often subordinate against claims to spouses or own parents. In addition maintenance obligation of adult children towards there own (minor) children are prior to child's obligation to support parents.

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## Annex:

### Average net earnings

#### General information

##### Definition

Average net monthly income of an unmarried person, living in a single household and earns 100 percent of the income of an "average worker" (AW) in 2009 or 100 percent of the income of an "average production worker" (APW) in 2004.

##### Unit

Euro per month

##### General remarks

This indicator is not part of the database but is used several times to calculate country relative generosity. Break in series between 2005 and 2006. Basis to determine the average income has been changed.

##### Reference years

2004, 2009

##### Missing countries

Georgia, Russia

##### Sources

Eurostat 2011e

#### Measurement

The average net earnings are used to calculate relative support levels within countries, e.g. to express the amount of child allowance as a share of national average income.

Net earnings are calculated from gross earnings by deducting the employee's social security contributions and income taxes for a single person (unmarried) household with 100 percent of average earning. Income tax and social security contributions parameters refer to the beginning of the fiscal year, i.e. changes occurring later during the year are ignored.

The data presented in table 3 refer to an average worker at national level expressed as percentage of the average earnings of an average worker (AW) since 2006. The new wage benchmark which extends the range of industries (NACE C-K). The replace old benchmark of the "average production worker" (APW) include only industries in NACE D (Eurostat 2009).

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*Table 3: Average net income as reported from 27.05.2011*

	2004	2009
	Euro per month	Euro per month
Austria	1917	2220
Belgium	1728	1985
Bulgaria	110	246
Cyprus <sup>1</sup>	1296	1703
Czech Republic	417	691
Denmark	2090	2484
Estonia	373	644
Finland	1803	2245
France	1757	1984
Germany	1833	2001
Greece	947	1223
Hungary	368	451
Ireland	2323	2647
Italy	1388	1615
Latvia	224	495
Lithuania	239	447
Luxembourg	2535	2957
Malta	989	1191
Netherlands	2128	2516
Norway	2549	3008
Poland	357	515
Portugal	884	1105
Romania	144	298
Slovakia	311	592
Slovenia	668	899
Spain	1335	1615
Sweden	1912	2121
United Kingdom	2634	2369

Note: <sup>1</sup> The figure for Cyprus in 2009 refer to 2007.

Source: Eurostat 2011e

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