Deliverable Number: D5.1

Deliverable Title: Upgraded work and retirement module for main survey of Wave 8
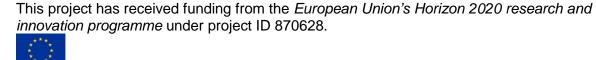
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SHARE is a research infrastructure to better understand and cope with population ageing created after a joint communication by the European Council and the European Parliament to the European Commission. It has been a huge success measured by the number of users, the number of scientific publications and its public policy support. The data has world-class value as proven by the many users also outside of the EU, especially in the US. The key value of SHARE lies in its strict cross-national comparability which permits unbiased cross-national comparisons of the economic, health and social situation of European citizens aged 50 and over.

To obtain this key value, SHARE aims to include all European countries, especially all EU member states. SHARE has made great progress during the first waves and has collected data in 28 countries. Moreover, substantial international coordination has to be done among these countries. To this end, SHARE has implemented an efficient and effective central management model.

The project aims to strengthen the centralised approach of SHARE with the aim to combine scientific excellence with cohesion across all 28 SHARE member countries. Specifically, the project will support the supra-national innovation and development tasks to be executed by the Area Coordinators (scientific content) and the survey designers (fieldwork methods and electronic tools) during Waves 8-10 of SHARE.

IF (MN024_NursingHome = a1)

EP001_Intro (INTRODUCTION EMPLOYMENT AND PENSIONS)

Now I am going to ask you some questions about your current employment situation.

1. Continue

EP005_CurrentJobSit (CURRENT JOB SITUATION)

Please look at card 21. In general, which of the following best describes your **current** employment situation?
Code only one
Only if R in doubt then refer to the following:
1. Retired (retired from own work, including semi-retired, partially retired, early retired, pre-retired). Retired refers to retired from own work only. Recipients of survivor pensions who do not receive pensions from own work should not be coded as retired. If they do not fit in categories 2 through 5, they should go into other.

1. Retired
2. Employed or self-employed (including working for family business)
3. Unemployed
4. Permanently sick or disabled
5. Homemaker
97. Other

IF ((EP005_CurrentJobSit = a1 AND (MN041_retireinfo = 1))

EP329_RetYear (RETIREMENT YEAR)

In which year did you retire?

NUMBER [1900..2020]

IF (EP329_RetYear = RESPONSE)

CHECK: (NOT(EP329_RetYear < MN002_Person[1].Year16)) [Retirement year lies before 16th birthday. If year is correct, please press "suppress" and enter a remark to explain;]

ENDIF

EP328_RetMonth (RETIREMENT MONTH)

Do you remember in what month that was?

1. January
2. February
3. March
4. April
5. May
6. June

7. July
8. August
9. September
10. October
11. November
12. December

EP064_ResForRet (MAIN REASON FOR EARLY RETIREMENT)

Please look at card 22.
For which reasons did you retire?
Code all that apply.;

SET OF 1. Became eligible for public pension
2. Became eligible for private occupational pension
3. Became eligible for a private pension
4. Was offered an early retirement option/window with special incentives or bonus
5. Made redundant (for example pre-retirement)
6. Own ill health
7. Ill health of relative or friend
8. To retire at same time as spouse or partner
9. To spend more time with family
10. To enjoy life

ENDIF
IF (EP005_CurrentJobSit = a3)

EP337_LookingForJob (LOOKING FOR JOB)

Are you currently looking for a job?

1. Yes
5. No

EP067_HowUnempl (HOW BECAME UNEMPLOYED)

Would you tell us how you became unemployed? Was it
Read out.;
For seasonal workers code 5

1. Because your place of work or office closed
2. Because you resigned
3. Because you were laid off
4. By mutual agreement between you and your employer
5. Because a temporary job had been completed
6. Because you moved to another town
97. Other reason

ENDIF
IF (EP005_CurrentJobSit <> a2)

EP002_PaidWork (DID ANY PAID WORK)

[We are interested in your work experiences since our last interview.] Did you do any paid work[since our last interview in/ during the last four weeks], either as an employee or self-employed, even if this was only for a few hours?

1. Yes
5. No

ENDIF
IF (MN101_Longitudinal = 0)

IF ((((EP005_CurrentJobSit = 4 OR (EP005_CurrentJobSit = 5) OR (EP005_CurrentJobSit = 97) AND (EP002_PaidWork = a5))

EP006_EverWorked (EVER DONE PAID WORK)

Have you ever done any paid work?

1. Yes
5. No

ENDIF

ENDIF
IF (MN101_Longitudinal = 1)

IF ((EP005_CurrentJobSit = a2 OR (EP002_PaidWork = a1))

EP125_ContWork (CONTINUOUSLY WORKING)

I'd like to know about all of the work for pay that you may have done since ^FLLastInterviewMonthYear; through the present. During that time, have you been working continuously?
Vacation period should not be counted as interruptions.

1. Yes
5. No

ENDIF
IF (EP125_ContWork = a1)

EP141_ChangeInJob (CHANGE IN JOB)

Please look at card 23. Even though you have been working continuously since ^FLLastInterviewMonthYear;, have you experienced any of the changes listed on this card? Code all that apply.;

SET OF 1. A change in type of employment (for instance from dependent employment to self-employment)
2. A change in employer
3. A promotion
4. A change in job location

5. A change in contract length (from long term to short term or viceversa)
96. None of the above

CHECK: (NOT((count(EP141_ChangeInJob) > 1 AND ((96 IN (EP141_ChangeInJob))))))
[You cannot select '96' together with any other answer. Please change your answer.;]

ENDIF
IF (EP125_ContWork = a5)

EP127_PeriodFromMonth (PERIOD FROM MONTH)

From what **month** and year have you been[working/ unemployed]?

MONTH:
YEAR:

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

EP128_PeriodFromYear (PERIOD FROM YEAR)

From what month and **year** have you been[working/ unemployed]?

MONTH ^EP127_PeriodFromMonth;
YEAR

1. 2005 or earlier
2. 2006
3. 2007
4. 2008
5. 2009
6. 2010
7. 2011
8. 2012
9. 2013
10. 2014
11. 2015
12. 2016
13. 2017
14. 2018
15. 2019
16. 2020

EP129_PeriodToMonth (PERIOD TO MONTH)

To what **month** and year have you been[working/ unemployed]?

MONTH:
YEAR:
If spell still ongoing type 13. Today

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. Today

IF (EP129_PeriodToMonth <> a13)

EP130_PeriodToYear (PERIOD TO YEAR)

To what month and **year** have you been[working/ unemployed]?

MONTH: ^EP129_PeriodToMonth;

YEAR:
To year

1. 2005 or earlier
2. 2006
3. 2007
4. 2008
5. 2009
6. 2010
7. 2011
8. 2012
9. 2013
10. 2014
11. 2015
12. 2016
13. 2017
14. 2018
15. 2019
16. 2020

ENDIF

EP133_PeriodOtherEp (OTHER PERIODS)

Were there other times since ^FLLastInterviewMonthYear; when you have been[working for pay/ unemployed]?

1. Yes
5. No

[1] LOOP cnt := 2 TO 20

IF (PeriodOtherEpisodes[cnt - 1].EP133_PeriodOtherEp = a1)

EP127_PeriodFromMonth (PERIOD FROM MONTH)

From what **month** and year have you been[working/ unemployed]?

MONTH:
YEAR:

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

EP128_PeriodFromYear (PERIOD FROM YEAR)

From what month and **year** have you been[working/ unemployed]?

MONTH ^EP127_PeriodFromMonth;
YEAR

1. 2005 or earlier
2. 2006
3. 2007
4. 2008
5. 2009
6. 2010
7. 2011
8. 2012
9. 2013
10. 2014
11. 2015
12. 2016
13. 2017
14. 2018

15. 2019
16. 2020

EP129_PeriodToMonth (PERIOD TO MONTH)

To what **month** and year have you been[working/ unemployed]?

MONTH:
YEAR:
If spell still ongoing type 13. Today

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. Today

IF (EP129_PeriodToMonth <> a13)

EP130_PeriodToYear (PERIOD TO YEAR)

To what month and **year** have you been[working/ unemployed]?

MONTH: ^EP129_PeriodToMonth;

YEAR:
To year

1. 2005 or earlier
2. 2006
3. 2007
4. 2008
5. 2009
6. 2010
7. 2011
8. 2012
9. 2013
10. 2014
11. 2015
12. 2016
13. 2017
14. 2018
15. 2019
16. 2020

ENDIF

EP133_PeriodOtherEp (OTHER PERIODS)

Were there other times since ^FLLastInterviewMonthYear; when you have been[working for pay/ unemployed]?

1. Yes
5. No

[cnt]

ENDIF

ENDLOOP

ENDIF

ENDIF
IF ((((MN101_Longitudinal = 0 AND (EP006_EverWorked = a1) AND (EP005_CurrentJobSit = a5) OR ((((MN101_Longitudinal = 1 AND (EP005_CurrentJobSit = a5) AND (EP002_PaidWork = a1) AND (EP335_Today = a5)))

EP069_ResStopWork (REASON STOP WORKING)

You said you are currently a homemaker, but you have done paid work in the past. Why did you stop working?
Read out.; Code all that apply.;

1. Because of health problems
2. It was too tiring
3. It was too expensive to hire someone to look after home or family
4. Because you wanted to take care of children or grandchildren
5. Because you were laid off, or your place of work or office closed
6. Because family income was sufficient
7. To care for an old or sick family member
97. Other

ENDIF
IF (MN101_Longitudinal = 1)

IF (((EP005_CurrentJobSit <> a3 AND ((EP125_ContWork = a5 OR ((EP005_CurrentJobSit <> a2 AND (EP002_PaidWork = a5))) AND (MN808_AgeRespondent <= 75))

EP325_UnEmpl (UNEMPLOYED)

Were there any times since ^FLLastInterviewMonthYear;, when you were unemployed?

1. Yes
5. No

ENDIF
IF (EP005_CurrentJobSit = a3)

EP632_Intro (INTRODUCTION WHEN UNEMPLOYED)

Now I'd like to know about the times since our last interview through the present in which you were unemployed.

1. Continue

ENDIF
IF ((EP325_UnEmpl = a1 OR (EP005_CurrentJobSit = a3))

EP633_Intro (INTRODUCTION DATES UNEMPLOYED)

When were you unemployed? Please give me all of your start and stop dates.

1. Continue

EP127_PeriodFromMonth (PERIOD FROM MONTH)

From what **month** and year have you been[working/ unemployed]?

MONTH:
YEAR:

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

EP128_PeriodFromYear (PERIOD FROM YEAR)

From what month and **year** have you been[working/ unemployed]?

MONTH ^EP127_PeriodFromMonth;
YEAR

1. 2005 or earlier
2. 2006
3. 2007
4. 2008
5. 2009
6. 2010
7. 2011
8. 2012
9. 2013
10. 2014
11. 2015

12. 2016
13. 2017
14. 2018
15. 2019
16. 2020

EP129_PeriodToMonth (PERIOD TO MONTH)

To what **month** and year have you been[working/ unemployed]?

MONTH:
YEAR:
If spell still ongoing type 13. Today

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. Today

IF (EP129_PeriodToMonth <> a13)

EP130_PeriodToYear (PERIOD TO YEAR)

To what month and **year** have you been[working/ unemployed]?

MONTH: ^EP129_PeriodToMonth;

YEAR:
To year

1. 2005 or earlier
2. 2006
3. 2007
4. 2008
5. 2009
6. 2010
7. 2011
8. 2012
9. 2013
10. 2014
11. 2015
12. 2016
13. 2017
14. 2018

15. 2019
16. 2020

ENDIF

EP133_PeriodOtherEp (OTHER PERIODS)

Were there other times since ^FLLastInterviewMonthYear; when you have been[working for pay/ unemployed]?

1. Yes
5. No

[21] LOOP cnt := 22 TO 40

IF (PeriodOtherEpisodes[cnt - 1].EP133_PeriodOtherEp = a1)

EP127_PeriodFromMonth (PERIOD FROM MONTH)

From what **month** and year have you been[working/ unemployed]?

MONTH:
YEAR:

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

EP128_PeriodFromYear (PERIOD FROM YEAR)

From what month and **year** have you been[working/ unemployed]?

MONTH ^EP127_PeriodFromMonth;
YEAR

1. 2005 or earlier
2. 2006
3. 2007
4. 2008
5. 2009
6. 2010
7. 2011
8. 2012
9. 2013
10. 2014

11. 2015
12. 2016
13. 2017
14. 2018
15. 2019
16. 2020

EP129_PeriodToMonth (PERIOD TO MONTH)

To what **month** and year have you been[working/ unemployed]?

MONTH:
YEAR:
If spell still ongoing type 13. Today

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. Today

IF (EP129_PeriodToMonth <> a13)

EP130_PeriodToYear (PERIOD TO YEAR)

To what month and **year** have you been[working/ unemployed]?

MONTH: ^EP129_PeriodToMonth;

YEAR:
To year

1. 2005 or earlier
2. 2006
3. 2007
4. 2008
5. 2009
6. 2010
7. 2011
8. 2012
9. 2013
10. 2014
11. 2015
12. 2016
13. 2017
14. 2018

15. 2019
16. 2020

ENDIF

EP133_PeriodOtherEp (OTHER PERIODS)

Were there other times since ^FLLastInterviewMonthYear; when you have been[working for pay/ unemployed]?

1. Yes
5. No

[cnt]

ENDIF

ENDLOOP

ENDIF

ENDIF
IF (((EP005_CurrentJobSit = a2 OR ((MN101_Longitudinal = 0 AND (EP002_PaidWork = a1)) OR ((MN101_Longitudinal = 1 AND (EP335_Today = a1)))

EP008_Intro1 (INTRODUCTION CURRENT JOB)

The following questions are about your current main job.
Including seasonal job. The main job is the job the respondent is working most hours for. If same hours then choose the one the respondent gets more money from.

1. Continue

EP009_EmployeeOrSelf (EMPLOYEE OR SELF-EMPLOYED)

In this job are you a private-sector employee, a public sector employee or self-employed?

1. Private sector employee
2. Public sector employee
3. Self-employed

IF (((MN101_Longitudinal = 0 OR (NOT((a96 IN (EP141_ChangeInJob))) OR (EP125_ContWork = a5))

EP010_CurJobYear (START OF CURRENT JOB (YEAR))

In which year did you start this job?

NUMBER [1940..2020]

IF (EP010_CurJobYear = RESPONSE)

CHECK: (NOT(YEAR(SYSDATE()) - EP010_CurJobYear10 > MN808_AgeRespondent))
[Year should be at least 10 years after year of birth. If year is correct, please press "suppress" and enter a remark to explain;]

ENDIF

EP616_NTofJob (NAME OR TITLE OF JOB)

What is this job called? Please give the exact name or title.

STRING

IF (NOT(EP616_NTofJob = Refusal))

EP616c_NTofJobCode (JOBCODER - NAME OR TITLE OF JOB)

I will now search for your job title among official jobs titles in our database.
Re-type the job title and select the best match from the drop-down list. If you navigate or scroll down, you will find more job titles.
If you don't find the job title, ask the R to think of a different name for the job or to give a broader or a more specific job description.
If you cannot find any good match at all, type 991.

STRING

JOBCODER: InDataOccupationsA
IF ((NOT(EP616c_NTofJobCode = Empty) AND (NOT(EP616c_NTofJobCode = 991))))

EP616d_NTofJobCode (JOBCODER - NEXT)
Please verify that you selected the correct job title:
^EP616c_NTofJobCode;
If this is not the correct job title, go back and select the best match from the drop-down list.

1. Confirm and continue

ENDIF

ENDIF

EP018_WhichIndustry (WHICH INDUSTRY ACTIVE)

Please look at card 24. What kind of business, industry or services do you work in?

1. Agriculture, hunting, forestry, fishing
2. Mining and quarrying
3. Manufacturing
4. Electricity, gas and water supply
5. Construction
6. Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods
7. Hotels and restaurants
8. Transport, storage and communication
9. Financial intermediation
10. Real estate, renting and business activities

11. Public administration and defence; compulsory social security
12. Education
13. Health and social work
14. Other community, social and personal service activities

IF (EP009_EmployeeOrSelf = 3)

EP024_NrOfEmployees (NUMBER OF EMPLOYEES)

How many employees, if any, do you have in this job?
Excluding respondent; only count people who work for or under the supervision of the respondent
Read out.;

0. None
1. 1 to 5
2. 6 to 15
3. 16 to 24
4. 25 to 199
5. 200 to 499
6. 500 or more

ENDIF
IF ((EP009_EmployeeOrSelf = a1 OR (EP009_EmployeeOrSelf = 2))

EP811_TermJob (TERM OF JOB)

In this job, do you have a fixed-term or a permanent contract?
If asked, please explain that fixed-term contract has a pre-determined termination date

1. Fixed-term
2. Permanent
3. No contract (spontaneous only)

ENDIF

ENDIF

EP013_TotWorkedHours (TOTAL HOURS WORKED PER WEEK)

Including any paid or unpaid overtime, but not counting meal breaks, how many hours a week do you usually work in this job?
This refers to the 'usual' working week. A seasonal worker working 40 hours a week for three months a year, should answer 40.

NUMBER [0..168]

IF (EP013_TotWorkedHours = RESPONSE)

CHECK: (EP013_TotWorkedHours < 71) [Please check, number of hours seems to high;]

ENDIF

ENDIF
IF (EP005_CurrentJobSit = a2)

IF (MN101_Longitudinal = 1)

EP025_Intro (INTRODUCTION WORK SATISFACTION)

Please look at card 25.
Regarding your present job we would like to know whether you strongly agree, agree, disagree or strongly disagree with the following statements.
Start of a **Non-proxy section**. No proxy allowed. If the respondent is not capable of answering any of these questions on her/his own, press **CTRL-K** at each question.

1. Continue

EP026_SatJob (SATISFIED WITH JOB)

All things considered I am satisfied with my job. Would you say you strongly agree, agree, disagree or strongly disagree?
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP027_JobPhDem (JOB PHYSICALLY DEMANDING)

My job is physically demanding. Would you say you strongly agree, agree, disagree or strongly disagree?
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP028_TimePress (TIME PRESSURE DUE TO A HEAVY WORKLOAD)

I am under constant time pressure due to a heavy workload. (Would you say you strongly agree, agree, disagree or strongly disagree?)
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP029_LitFreeWork (LITTLE FREEDOM TO DECIDE HOW I DO MY WORK)

I have very little freedom to decide how I do my work. (Would you say you strongly agree, agree, disagree or strongly disagree?)
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP030_NewSkill (I HAVE AN OPPORTUNITY TO DEVELOP NEW SKILLS)

I have an opportunity to develop new skills. (Would you say you strongly agree, agree, disagree or strongly disagree?)
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP031_SuppDiffSit (SUPPORT IN DIFFICULT SITUATIONS)

I receive adequate support in difficult situations. (Would you say you strongly agree, agree, disagree or strongly disagree?)
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP032_RecognWork (RECEIVE THE RECOGNITION DESERVING FOR MY WORK)

I receive the recognition I deserve for my work. (Would you say you strongly agree, agree, disagree or strongly disagree?)
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP033_SalAdequate (SALARY OR EARNINGS ARE ADEQUATE)

Considering all my efforts and achievements, my[salary is/ earnings are] adequate. (Would you say you strongly agree, agree, disagree or strongly disagree?)
Show card 25. In case of doubt explain: we mean adequate for the work done.

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP034_JobPromPoor (PROSPECTS FOR JOB ADVANCEMENT ARE POOR)

My[job promotion prospects/ prospects for job advancement] are poor. (Would you say you strongly agree, agree, disagree or strongly disagree?)
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

EP035_JobSecPoor (JOB SECURITY IS POOR)

My job security is poor. (Would you say you strongly agree, agree, disagree or strongly disagree?)
Show card 25

1. Strongly agree
2. Agree
3. Disagree
4. Strongly disagree

ENDIF

ENDIF
IF (((EP005_CurrentJobSit = a2 OR ((MN101_Longitudinal = 0 AND (EP002_PaidWork = a1)) OR ((MN101_Longitudinal = 1 AND (EP335_Today = a1)))

IF (EP005_CurrentJobSit = a2)

EP036_LookForRetirement (LOOK FOR EARLY RETIREMENT)

Thinking about your present job, would you like to retire as early as you can from this job?

1. Yes
5. No

EP037_AfraidHRet (AFRAID HEALTH LIMITS ABILITY TO WORK BEFORE REGULAR RETIREMENT)

Are you afraid that your health will limit your ability to work in this job before regular retirement?

1. Yes
5. No

EP007_MoreThanOneJob (CURRENTLY MORE THAN ONE JOB)

So far we have talked about your main job. Do you currently have a second job besides your main job?
Please consider only paid jobs

1. Yes
5. No

ENDIF

ENDIF
IF ((MN101_Longitudinal = 0 AND (((EP006_EverWorked = a1 OR (EP005_CurrentJobSit = a1) OR (EP005_CurrentJobSit = a3)))

EP048_IntroPastJob (INTRODUCTION PAST JOB)

We are now going to talk about the last job you had[before you retired/ before you became unemployed].

1. Continue

EP050_YrLastJobEnd (YEAR LAST JOB END)

In which year did your last job end?

NUMBER [1900..2020]

IF (EP050_YrLastJobEnd = RESPONSE)

CHECK: (YEAR(SYSDATE()) - EP050_YrLastJobEnd10 < MN808_AgeRespondent) [Year should be at least 10 years after year of birth. If year is correct, please press "suppress" and enter a remark to explain;]

ENDIF

EP649_YrsInLastJob (YEARS WORKING IN LAST JOB)

How many years did you work in your last job?
If more than one job, the question should refer to the one considered as main job by respondent. Include periods of unpaid leave. 1 for 6 months or more, 0 for less than 6 months.

NUMBER [0..99]

IF (EP649_YrsInLastJob = RESPONSE)

CHECK: (EP649_YrsInLastJob < MN808_AgeRespondent) [Number should be less than or equal to respondent's age. If age is correct, please press "suppress" and enter a remark to explain;]

ENDIF

EP051_EmployeeORSelf (EMPLOYEE OR A SELF EMPLOYED IN LAST JOB)

In this job were you a private sector employee, a public sector employee or self-employed?

1. Private sector employee
2. Public sector employee
3. Self-employed

EP152_NTofJob (NAME OR TITLE OF JOB)

What was this job called? Please give the exact name or title.

STRING

IF (NOT(EP152_NTofJob = Refusal))

EP152c_NTofJobCode (JOBCODER - NAME OR TITLE OF JOB)

I will now search for your job title among official jobs titles in our database.
Re-type the job title and select the best match from the drop-down list. If you navigate or scroll down, you will find more job titles.
If you don't find the job title, ask the R to think of a different name for the job or to give a broader or a more specific job description.
If you cannot find any good match at all, type 991.

STRING

JOBCODER: InDataOccupationsB
IF ((NOT(EP152c_NTofJobCode = Empty) AND (NOT(EP152c_NTofJobCode = 991)))

EP152d_NTofJobCode (JOBCODER - NEXT)
Please verify that you selected the correct job title:
^EP152c_NTofJobCode;
If this is not the correct job title, go back and select the best match one from the drop-down list.

1. Confirm and continue

ENDIF

ENDIF

EP054_WhichIndustry (WHICH INDUSTRY ACTIVE)

Please look at card 24. What kind of business, industry or services did you work in?
Code answers 1..14.

1. Agriculture, hunting, forestry, fishing
2. Mining and quarrying
3. Manufacturing
4. Electricity, gas and water supply
5. Construction
6. Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods
7. Hotels and restaurants
8. Transport, storage and communication
9. Financial intermediation
10. Real estate, renting and business activities
11. Public administration and defence; compulsory social security
12. Education
13. Health and social work
14. Other community, social and personal service activities

IF (EP051_EmployeeORSelf = 3)

EP061_NrOfEmployees (NUMBER OF EMPLOYEES)

How many employees, if any, did you have?
Read answers out

0. None
1. 1 to 5
2. 6 to 15
3. 16 to 24
4. 25 to 199
5. 200 to 499
6. 500 or more

ENDIF

ENDIF

ENDIF

EP203_IntroEarnings (INTRO INDIVIDUAL INCOME)

We would now like to know more about your earnings and income during the last year, that is in ^FLLastYear;.

1. Continue

EP204_AnyEarnEmpl (ANY EARNINGS FROM EMPLOYMENT LAST YEAR)

Have you had any wages, salaries or other earnings from dependent employment in ^FLLastYear;?

1. Yes
5. No

IF (EP204_AnyEarnEmpl = a1)

EP205_EarningsEmplAT (EARNINGS EMPLOYMENT PER YEAR AFTER TAXES)

After any taxes and contributions, what was your approximate annual income from employment in the year ^FLLastYear;? Please include any additional or extra or lump sum payment, such as bonuses, 13th month, Christmas or Summer pays.
Amount in ^FLCurr;

NUMBER [0..100000000000000000]

IF (EP205_EarningsEmplAT = NONRESPONSE)

[Unfolding Bracket Sequence]

ENDIF

ENDIF

EP206_AnyIncSelfEmpl (INCOME FROM SELF-EMPLOYMENT LAST YEAR)

Have you had any income at all from self-employment or work for a family business in ^FLLastYear;?

1. Yes
5. No

IF (EP206_AnyIncSelfEmpl = a1)

EP207_EarningsSelfAT (EARNINGS PER YEAR AFTER TAXES FROM SELF-EMPLOYMENT)

After any taxes and contributions and after paying for any materials, equipment or goods that you use in your work, what was your approximate annual income from self-employment in the year ^FLLastYear;?
Amount in ^FLCurr;

NUMBER

IF (EP207_EarningsSelfAT = NONRESPONSE)

[Unfolding Bracket Sequence]

ENDIF

ENDIF

EP303_Intro (INTRODUCTION INCOME FROM PUBLIC PENSIONS)

Now we are going to ask you a set of questions regarding income from different public pensions and benefits. We are interested in the amounts, timing of these payments, and finally for how long you have received them.

1. Continue

EP671_IncomeSources (INCOME FROM PUBLIC PENSIONS IN LAST YEAR)

Please look at card 26.
Have you received income from any of these sources in the year ^FLLastYear;?
Main public sickness benefits: they are contribution-based payments received as an earnings replacement when an employee is off sick.
Main public disability insurance pension: if the sickness turns out to be long-standing, and a return to work is not to be expected, then the claimant will typically be transferred to a disability insurance pension (e.g. invalidity or incapacity benefit). The term 'pension' in the heading of this category is to be meant as 'regular payment', rather than relating to old age.
Public unemployment benefit or insurance: they are received, for a limited time period, by previous employees, later finding themselves unemployed. Eligibility is based on a history of insurance contribution.
Public long-term care insurance: it includes cash payments meant to provide for long term care needs; receipt does not necessarily depend on having previously paid contributions.
Social assistance: it includes cash or voucher programmes meant to provide a general 'safety

net', guaranteeing minimum resources to those otherwise lacking resources from either employment or contributory based social security benefits/pensions.
Code all that apply.;

1. Public old age pension
2. Public old age supplementary pension or public old age second pension
3. Public early retirement or pre-retirement pension
4. Main public sickness benefits
5. Main public disability insurance pension
6. Secondary public disability insurance pension
7. Secondary public sickness benefits
8. Public unemployment benefit or insurance
9. Main public survivor pension from your spouse or partner
10. Secondary public survivor pension from your spouse or partner
11. Public war pension
12. Public long-term care insurance
13. Social assistance
96. None of these

CHECK: (NOT((count(EP671_IncomeSources) > 1 AND ((96 IN (EP671_IncomeSources)))) [You cannot select '96' together with any other answer. Please change your answer.;] LOOP cnt := 1 TO 13

IF ((cnt IN (EP671_IncomeSources))

EP078_AvPaymPens (TYPICAL PAYMENT OF PENSIONS)

After taxes, about how large was a typical payment of[your public old age pension/ your public old age supplementary pension or public old age second pension/ your public early retirement or pre-retirement pension/ your main public sickness benefits/ your main public disability insurance pension/ your secondary public disability insurance pension/ your Secondary public sickness benefits"/ your public unemployment benefit or insurance/ your main public survivor pension from your spouse or partner/ your secondary public survivor pension from your spouse or partner/ your public war pension/ your public long-term care insurance/ your social assistance] in ^FLLastYear;?
Amount in ^FLCurr;
It is an ordinary typical-regular payment, excluding any extras, such as bonuses, 13th month, lump-sum payments etc.
The time period will be asked in the next question: it could be monthly, quarterly or weekly, for example.
The R should tell what the typical payment was for such a period during the year indicated in the question.

NUMBER [0..100000000000000000]

IF (EP078_AvPaymPens = NONRESPONSE)

[Unfolding Bracket Sequence]

ENDIF

EP074_PeriodBenefit (PERIOD OF INCOME SOURCE)

What period did that payment cover?
Do not include lump-sum payments. This will be asked later.

1. One week
2. Two weeks
3. Calendar month/4 weeks
4. Three months/13 weeks
5. Six months/26 weeks
6. Full year/12 months/52 weeks
97. Other (specify)

IF (EP074_PeriodBenefit = a97)

EP075_OthPeriodBenefits (OTHER PERIOD OF RECEIVING BENEFITS)

Note other period

STRING

ENDIF

EP208_MonthsRecIncSource (HOW MANY MONTHS RECEIVED INCOME SOURCE)

For how many months altogether did you receive[the public old age pension/ the public old age supplementary pension or public old age second pension/ the public early retirement or pre-retirement pension/ the main public sickness benefits/ the main public disability insurance pension/ the secondary public disability insurance pension/ the secondary public sickness benefits/ the public unemployment benefit or insurance/ the main public survivor pension from your spouse or partner/ the secondary public survivor pension from your spouse or partner/ the public war pension/ the public long-term care insurance/ the social assistance] in ^FLLastYear;?
Not how many payments were made, but the time-span. Example: the pension was received throughout the whole year, the answer is 12. In case the respondent started receiving it in November, the answer is 2.

NUMBER [1..12]

IF (MN101_Longitudinal = 1)

EP612_WhenSource_long (BENEFIT BEFORE LAST INTERVIEW)

Did you first receive [the public old age pension/ the public old age supplementary pension or public old age second pension/ the public early retirement or pre-retirement pension/ the main public sickness benefits/ the main public disability insurance pension/ the secondary public disability insurance pension/ the secondary public sickness benefits/ the public unemployment benefit or insurance/ the main public survivor pension from your spouse or partner/ the secondary public survivor pension from your spouse or partner/ the public war pension/ the public long-term care insurance/ the social assistance] before our last interview in ^FLLastInterviewMonthYear;?

1. Yes, before last interview
5. No, after last interview

ENDIF
IF ((NOT(MN101_Longitudinal = 1) OR (EP612_WhenSource_long = a5))

EP213_YearRecIncSource (YEAR RECEIVED INCOME SOURCE)

In which year did you first receive your[public old age pension/ public old age supplementary pension or public old age second pension/ public early retirement or pre-retirement pension/ main public sickness benefits/ main public disability insurance pension/ secondary public disability insurance pension/ secondary public sickness benefits/ public unemployment benefit or insurance/ main public survivor pension from your spouse or partner/ secondary public survivor pension from your spouse or partner/ public war pension/ public long-term care insurance/ social assistance]?
In case of benefit received discontinuously during life (e.g., unemployment benefits received for different unemployment episodes), refer to the first payment of current stream of benefit, NOT to the first in life.

NUMBER [1930..2020]

IF (EP213_YearRecIncSource = RESPONSE)

CHECK: (YEAR(CURRENTDATE) - EP213_YearRecIncSource <= MN808_AgeRespondent) [Year should be greater than or equal to birthyear. If year is correct, please press "suppress" and enter a remark to explain;]

ENDIF

ENDIF

EP081_LumpSumPenState (LUMP SUM PAYMENT INCOME SOURCE)

Did you receive any additional, or extra or lump sum (one off) payment from[your public old age pension/ your public old age supplementary pension or public old age second pension/ your public early retirement or pre-retirement pension/ your main public sickness benefits/ your main public disability insurance pension/ your secondary public disability insurance pension/ your secondary public sickness benefits/ your public unemployment benefit or insurance/ your main public survivor pension from your spouse or partner/ your secondary public survivor pension from your spouse or partner/ your public war pension/ your public long-term care insurance/ your social assistance] during the year ^FLLastYear;?
Please make sure that R takes into account all additional/extra/lump-sum payments received (including bonuses, 13th month, Christmas and Summer pays, if any) to answer this question.

1. Yes
5. No

IF (EP081_LumpSumPenState = a1)

EP082_TotAmountLS (TOTAL AMOUNT OF LUMP SUM PAYMENT FROM INCOME SOURCE)

After taxes, about how much did you receive overall as additional or extra payments in ^FLLastYear; from[this public old age pension/ this public old age supplementary pension or public old age second pension/ this public early retirement or pre-retirement pension/ this main public sickness benefits/ this main public disability insurance pension/ this secondary public disability insurance pension/ this secondary public sickness benefits/ this public

unemployment benefit or insurance/ this main public survivor pension from your spouse or partner/ this secondary public survivor pension from your spouse or partner/ this public war pension/ this public long-term care insurance/ this social assistance]?
Amount in ^FLCurr;
Include all additional or extra payments

NUMBER [0..100000000000000000]

IF (EP082_TotAmountLS = NONRESPONSE)

[Unfolding Bracket Sequence]

ENDIF

ENDIF

ENDIF

ENDLOOP

EP624_OccPensInc (HAD OCCUPATIONAL PENSION INCOME SOURCES)

In addition to public pension benefits, pensions can also be provided through your employer. Have you received income from any occupational pension in the year ^FLLastYear;? Occupational old age pension from your last or former jobs, from an early retirement pension, from disability or invalidity insurance or survivor pension from your spouse or partner's job.

1. Yes
5. No

IF (EP624_OccPensInc = a1)

EP678_AvPaymPens (APPROXIMATE ANUAL PAYMENT OF PENSIONS)

After taxes, what was the approximate annual amount received from all your occupational pensions in ^FLLastYear;?
Amount in ^FLCurr; Please exclude additional or extra, or lump-sum (one off) payments, such as bonuses, 13th month, Christmas and Summer pays.

NUMBER [0..100000000000000000]

IF (EP678_AvPaymPens = NONRESPONSE)

[Unfolding Bracket Sequence]

ENDIF
IF (MN101_Longitudinal = 1)

EP621_WhenSource_long (BENEFIT BEFORE LAST INTERVIEW)

Did you start collecting your first occupational pension before our last interview in
^FLLastInterviewMonthYear;?
The first occupational pension is the first occupational pension the R has started collecting.

1. Yes, before last interview
5. No, after last interview

ENDIF
IF ((NOT(MN101_Longitudinal = 1) OR (EP621_WhenSource_long = a5))

EP613_YearRecIncSource (YEAR RECEIVED INCOME SOURCE)

In which year did you start collecting your first occupational pension?
The first occupational pension is the first occupational pension the R has started collecting.

NUMBER [1930..2020]

IF (EP613_YearRecIncSource = RESPONSE)

CHECK: (YEAR(CURRENTDATE) - EP613_YearRecIncSource <=
MN808_AgeRespondent) [Year should be greater than or equal to birthyear. If year is
correct, please press "suppress" and enter a remark to explain;]

ENDIF

ENDIF

EP681_LumpSumPenState (LUMP SUM PAYMENT INCOME SOURCE)

Did you receive any additional, or extra or lump-sum (one off) payment from any of your
occupational pensions during the year ^FLLastYear;?
Please make sure that R takes into account all additional or extra or lump-sum (one off)
payments received from any occupational pension (including bonuses, 13th month, Christmas
and Summer pays, if any) to answer this question.

1. Yes
5. No

IF (EP681_LumpSumPenState = a1)

EP682_TotAmountLS (TOTAL AMOUNT OF LUMP SUM PAYMENT FROM INCOME
SOURCE)

After taxes, about how much did you receive overall as additional or extra or lump-sum (one
off) payments in ^FLLastYear; from your occupational pensions?
Amount in ^FLCurr;
Include all additional or extra or lump-sum (one off) payments

NUMBER [0..10000000000000000]

IF (EP682_TotAmountLS = NONRESPONSE)

[Unfolding Bracket Sequence]

ENDIF

ENDIF

ENDIF

EP089_AnyRegPay (ANY OTHER REGULAR PAYMENTS RECEIVED)

Please look at card 27. Did you receive any of the following regular payments or transfers during the year ^FLLastYear;?
Code all that apply.;

SET OF 1. Life insurance payments from a private insurance company
2. Regular private annuity or private personal pension payments
3. Alimony
4. Regular payments from charities
5. Long-term care insurance payments from a private insurance company
96. None of these

CHECK: (NOT((count(EP089_AnyRegPay) > 1 AND ((96 IN (EP089_AnyRegPay))))) [You cannot select '96' together with any other answer. Please change your answer.;] LOOP cnt := 1 TO 5

IF ((cnt IN (EP089_AnyRegPay))

EP094_TotalAmountBenLP (TOTAL AMOUNT IN THE LAST PAYMENT)

After any taxes and contributions, about how large was the average payment of[your life insurance payments from a private insurance company/ your regular private annuity or private personal pension payments/ your alimony/ your regular payments from charities/ your long-term care insurance payments from a private insurance company] in ^FLLastYear;?
Amount in ^FLCurr;
Do not include lump-sum payments. This will be asked later.

NUMBER [0..100000000000000000]

IF (EP094_TotalAmountBenLP = NONRESPONSE)
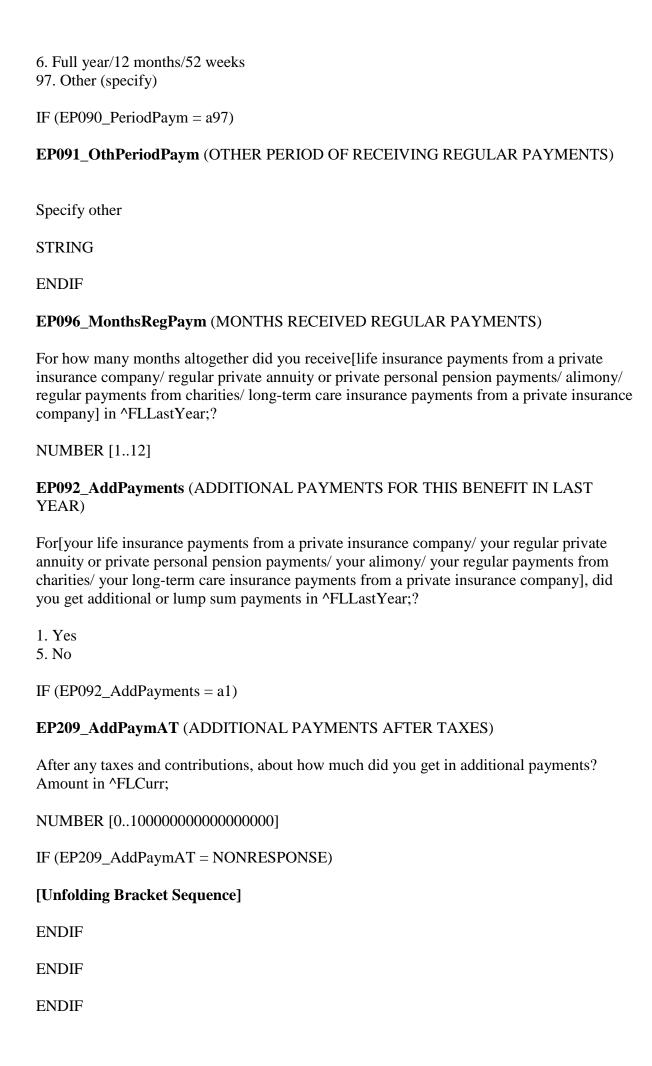
[Unfolding Bracket Sequence]

ENDIF

EP090_PeriodPaym (PERIOD RECEIVED REGULAR PAYMENTS)

Which period did that payment cover?

1. One week
2. Two weeks
3. Calendar month/4 weeks
4. Three months/13 weeks
5. Six months/26 weeks

6. Full year/12 months/52 weeks
97. Other (specify)

IF (EP090_PeriodPaym = a97)

EP091_OthPeriodPaym (OTHER PERIOD OF RECEIVING REGULAR PAYMENTS)

Specify other

STRING

ENDIF

EP096_MonthsRegPaym (MONTHS RECEIVED REGULAR PAYMENTS)

For how many months altogether did you receive[life insurance payments from a private insurance company/ regular private annuity or private personal pension payments/ alimony/ regular payments from charities/ long-term care insurance payments from a private insurance company] in ^FLLastYear;?

NUMBER [1..12]

EP092_AddPayments (ADDITIONAL PAYMENTS FOR THIS BENEFIT IN LAST YEAR)

For[your life insurance payments from a private insurance company/ your regular private annuity or private personal pension payments/ your alimony/ your regular payments from charities/ your long-term care insurance payments from a private insurance company], did you get additional or lump sum payments in ^FLLastYear;?

1. Yes
5. No

IF (EP092_AddPayments = a1)

EP209_AddPaymAT (ADDITIONAL PAYMENTS AFTER TAXES)

After any taxes and contributions, about how much did you get in additional payments? Amount in ^FLCurr;

NUMBER [0..100000000000000000]

IF (EP209_AddPaymAT = NONRESPONSE)

[Unfolding Bracket Sequence]

ENDIF

ENDIF

ENDIF

ENDLOOP IF ((MN024_NursingHome = a1 AND (MN808_AgeRespondent < 76))

EP097_PensClaim (PENSION CLAIMS)

Now we are talking about pensions you might receive in the future but you **do not receive currently**. Will you be entitled to at least one pension listed on card 28 which you do not receive currently?

1. Yes
5. No

IF (EP097_PensClaim = a1)

EP098_TypeOfPension (TYPE OF PENSION YOU WILL BE ENTITLED TO)

Which type or types of pension will you be entitled to?
Code all that apply.;
Respondent must not receive these pensions already

SET OF 1. Public old age pension
2. Public early retirement or pre-retirement pension
3. Public disability insurance; sickness/invalidity/incapacity pension
4. Private (occupational) old age pension
5. Private (occupational) early retirement pension

LOOP cnt := 1 TO 5

IF ((cnt IN (EP098_TypeOfPension))

EP102_CompVolun (COMPULSORY OF VOLUNTARY PLAN OR FUND)

Is participation in[this public old age pension/ this public early retirement or pre-retirement pension/ this public disability insurance; sickness/invalidity/incapacity pension/ this private (occupational) old age pension/ this private (occupational) early retirement pension] compulsory or voluntary?

1. Compulsory
2. Voluntary

EP103_YrsContrToPlan (YEARS CONTRIBUTING TO PLAN)

How many years have you been contributing to[your public old age pension/ your public early retirement or pre-retirement pension/ your public disability insurance; sickness/invalidity/incapacity pension/ your private (occupational) old age pension/ your private (occupational) early retirement pension] ?
Contribution by employer should be counted as well.

NUMBER [0..75]

CHECK: (EP103_YrsContrToPlan <= MN808_AgeRespondent) [Number should be less than or equal to respondent's age. If age is correct, please press "suppress" and enter a remark to explain;]

EP106_ExpRetAge (EXPECTED AGE TO COLLECT THIS PENSION)

At what age do you yourself expect to start collecting this pension payment for the first time?

NUMBER [30..75]

CHECK: (NOT((EP106_ExpRetAge < MN808_AgeRespondent AND (EP106_ExpRetAge = RESPONSE))) [Expected age should be higher than or equal to current age. If age is correct, please press "suppress" and enter a remark to explain;] IF (EP005_CurrentJobSit = a2)

EP609_PWExpPensStatAge (EXPECTED AMOUNT OF PENSION BENEFIT)

Please think about the time at which you will start collecting this pension. How much will be your first monthly benefit after taxes from [your public old age pension/ your public early retirement or pre-retirement pension/ your public disability insurance; sickness/invalidity/incapacity pension/ your private (occupational) old age pension/ your private (occupational) early retirement pension]?
Amount in ^FLCurr;

NUMBER [0..100000000000000000]

ENDIF
[cnt]

ENDIF

ENDLOOP

ENDIF

ENDIF

EP210_IntCheck (WHO ANSWERED SECTION EP)
Who answered the questions in this section?

1. Respondent only
2. Respondent and proxy
3. Proxy only

ENDIF